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ABSTRACT

Arguing that marketing is a management philosophy that has profoundly transformed the business world and could potentially modify the appearance and delivery of information services, this report describes in broad terms the ways in which the marketing approach may be included as a component in the education of information professionals. The major part of the report is devoted to discussions of the six modules into which the proposed course of study is divided: (1) the marketing approach as a management tool in the context of information services; (2) marketing and behavior patterns in the information field; (3) marketing research; (4) the marketing mix--supply; (5) The marketing mix--communication strategies; and (6) marketing strategy and planning. Discussion covers the possible content of such training and the training objectives corresponding to each module. Also provided are examples relevant to the situation of information specialists, a number of exercises to accompany the course, and suggested readings for tutors and students who wish to continue their training independently. Inservice training is geared toward professionals already in the workforce. The modules are presented in the order most conducive to the gradual acquisition of a basic knowledge of marketing, moving from general concepts to an explanation of specific concepts; however, teachers may alter this sequence as appropriate. (SD)

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Guidelines for the teaching of marketing in the training of librarians, documentalists and archivists

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GUIDELINES FOR THE TEACHING OF MARKETING IN THE TRAINING OF LIBRARIANS, DOCUMENTALISTS AND ARCHIVISTS

by Réjean Savard

General Information Programme and UNISIST

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PREFACE

It is generally recognized that the theoretical and practical training of competent information specialists represents the best long-term investment for the development of satisfactory information systems. Great efforts are being made in many countries - developed and developing alike - to establish the institutions required for this purpose. While facilities and teaching staff are the responsibility of the national authorities, international assistance is often sought for the production of teaching material. The needs in this area have been repeatedly stated over a number of years, and many documents on theoretical and practical training are available in several languages from Unesco (see list at the end of this study). It will be helpful to the potential user to clarify the intention behind the preparation of these documents and, at the same time, to say a few words concerning the present document, 'Guidelines for the teaching of marketing in the training of librarians, documentalists and archivists'.

Anyone involved in the educational process knows that teaching is an essentially personal activity, which is influenced by the educational environment, the students and the personality of the teacher. A programme or course on a specific subject is the result of a large number of interactions. The guidelines in this series do not therefore seek to lay down hard-and-fast rules but rather to recommend lines of approach. For the same reason, authors are given guidance regarding the overall shape of their work but they are not asked to ensure that it conforms in particular with other studies in the series. The reader will understand that such a requirement would be artificial and that authors need the intellectual freedom that goes with intellectual responsibility.

The range of teaching material required for the theoretical and practical training of information specialists is enormous. Clearly, it was essential to start with studies of a general nature, dealing with curriculum development, policy formulation and staffing forecasts, which are intended to assist Member States in planning and decision-making at national level.

Now that more specific themes may be tackled, it has been decided to respond to a persistent demand concerning subjects that urgently need to be reflected in professional practice, namely the new technologies, management, on-line information retrieval, etc. Marketing obviously has a place in this list. Nearly all of the institutions responsible for meeting information requirements are facing serious problems; and the need to make themselves better known, and to find out more about their public and its requirements, is now universally recognized. These guidelines for the teaching of marketing, by describing the concepts on which this technique rests and providing numerous specific examples of its application, should help to ensure that this approach is applied more rapidly and that information services of all kinds are used more effectively.

Another important focus of the work of Unesco's General Information Programme is the promotion of standardization in the training of archivists, librarians and information specialists. The rationale and practical advantages of such an approach have been explored and recognized not only in studies undertaken by the Organization but also by such non-governmental organizations as IFLA (International Federation of Library Associations and Institutions), FID (International Federation for Information and documentation) and ICA (International Council on Archives). Marketing, which has countless applications, is clearly one of the subjects that can be taught in this context.

It is to be hoped that archivists, librarians, information specialists and all those responsible for their theoretical and practical training will find in these guidelines material that will help them to remodel their teaching or professional practice.

In preparing this study the author enjoyed the co-operation of several specialists who kindly studied the first draft of the manuscript and participated in a seminar organized in Geneva from 8 to 10 October 1986 by the International Association of Information Science Schools. The author and Unesco would like to express their warmest thanks to these specialists: Mrs G. Adda (Tunis), Mrs J. Calixte (Marseilles), Mr P. Filiatrault (Montreal), Mrs J. Lefèvre (Paris), Mr F. Libmann (Paris), Mr N. Rambhujun (Bordeaux), and Mr H. Sené (Dakar).

The terms employed and the presentation of the material used in this study should not be seen as reflecting in any way the views of Unesco.

All remarks, suggested improvements or accounts of the experience of other countries in applying these guidelines will be most welcome. Correspondence should be sent to the General Information Programme Division, Unesco, 7 place de Fontenoy, 75700 Paris, France.

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1. INTRODUCTION

Although marketing as a term has been part of the everyday language for some years now, the concept remains ill-defined in the minds of most people. Marketing is too often identified with mere promotion or advertising, which actually constitute no more than a tiny part of the total marketing approach.

As Bernard Blanche(1) points out, marketing is a 'complex function', that is, a concept comprising a number of constituents. Lambin(2) states that it is both a system of thought and a system of action; and it has to be said that these two categories encompass fairly well the range of ideas implicit in marketing, i.e. the idea of 'strategic analysis' involving reflection on an organization's position in relation to its various groups of customers, and the 'operational' aspect covering the whole technical side of marketing including market research and marketing communication.

Other writers such as Darmon, Laroche and Petrov highlight the social aspect of marketing(3). For marketing is also a system of values which makes consumer satisfaction the basis for an organization's operation. This system of values transcends political systems since marketing is now universally accepted. The point is made by Serraf: 'Various experiments have shown the marketing approach to be completely effective in private enterprises in the developed and developing countries alike, in both capitalist economies and the socialist countries or those with a highly-planned economy, and in firms pursuing private profit or government departments, public services and local authorities'(4).

Denis Linden refers to a 'marketing ethos'(5) and we fully agree with this view, for marketing reflects a comprehensive approach to the problems of the organization.

We shall therefore define marketing as a management philosophy, that is to say, a way of conceiving management, which is naturally expressed in the form of appropriate action in the everyday life of the organization (this definition is adopted and spelt out in Module 1).

By management we mean: a 'set of techniques used within organizations in order to achieve the objectives those organizations have set themselves'(6). Hence, it is a philosophy that covers all management tasks, since 'management covers all the functions prescribed by Fayol: management means planning, organization, giving orders, co-ordinating and supervising'(7).

The chief aim of this marketing philosophy is to help organizations achieve something which they by nature seek - a closer relationship with their public. Information specialists(8) have always been concerned - and particularly in the last few decades - about their possible impact on the public. This concern is reflected in studies on the use and evaluation of information systems.

Ever since library science and information science were first taught at university level, particularly in North America, user survey methods have been included in courses in a number of institutions. Most of the research in this area is reckoned to be carried out with the aim of obtaining a better knowledge of the users of library archive and information services.

It was therefore only natural that information specialists should eventually develop an interest in the marketing of their services.

The first publications directly linking marketing with information services date from the beginning of the 1970s. In North America, it seems that libraries - particularly public libraries - were the first to realize that marketing could provide an answer to these concerns about the use of services, to judge at least from the earliest publications on the marketing of information(9). In Europe, however, a concern with marketing philosophy seems to have manifested itself initially in documentation centres.

Before 1970, it is true, the concept of marketing was confined almost exclusively to organizations supplying products rather than services. The marketing approach did not really develop until after the Second World War, and it was not until 1969, by which time marketing had already caused a considerable upheaval in the production sector, that a prominent American marketing expert, Philip Kotler, suggested extending the application of the concept to service organizations and non-profit-making bodies (10).

This view, which was initially challenged by some, is now accepted and several sectors in which marketing may be applied have now been identified in the area of information services alone (figure 1.1).

Information services may be marketed in a private or public context. In the first case, the marketing may either be strictly commercial and profit-oriented (firms of consultants and information brokers, on-line hosts, etc.) or non-profit-making (professional information science associations). The 'Central Lending Libraries' in Quebec (public libraries serving communities of fewer than 5,000 inhabitants) provide another good example of private non-profit-making bodies as they are officially registered as private companies (Company Law) but receive government subsidies.

Figure 1.1: Sectors in which information may be marketed

	PRIVATE	PUBLIC
PROFIT-MAKING	Information brokers consultants	State-subsidized data banks
NON-PROFIT-MAKING	Professional associations Central Lending Libraries (Quebec)	Public libraries University libraries School libraries etc. Archives

Information services in the public sector may either by profit-making, such as certain State-subsidized data banks, which seems to be quite common(11), or else non-profit-making. Most information services (public libraries, university libraries, school libraries, archive services, government documentation centres, etc.) belong to this second category. The organizations mentioned in that category are increasingly adopting a marketing approach, in particular because of the social and economic pressures that compel them to rationalize their management and even to charge for some of their services and also in response to the recent appearance of other 'charging' information services, which has had the effect of 'destabilizing' their activities, as pointed out by Blaise Cronin(12). It has been realized that, even in a 'public service' context in which users make no direct payment, information always has a price and that someone eventually has to pay the bill.

Thus, over the last ten years, a number of information services have been experimenting with modern marketing methods or, at least, certain aspects of marketing such as advertising and public relations. The number of training workshops on the subject and the number of publications provide a good indication of the level of interest, which seems to be constantly increasing.

The marketing approach may profoundly modify the appearance of information services just as it transformed the business world several years ago. The implications of the marketing approach are indeed quite radical as it forces the organization adopting it to question on occasion its whole basis and know-how. The manager who has been converted to marketing must attempt to adapt the services supplied by his organization to the needs of his public. It sometimes happens that institutions depart from their original objectives over the years and that marketing studies highlight the need for a major readjustment. For example, bureaucracy may with the passing years become all-pervasive at the expense of customers' needs. Organizations in such cases are practically 'disembodied' in terms of their social roles. Marketing can help them to improve their social utility, thereby possibly enabling them to survive when they were thought to be doomed.

Marketing is a tool which makes it possible to maximize exchanges between an organization and its various customers. In this connection, Dayan points out that a well-integrated marketing approach in an organization fosters such exchanges, since it makes for:

1. Greater flexibility and hence greater adaptability.

2. Responsiveness to the outside world conducive to the establishment of an ongoing dialogue with the organization's environment.

3. Greater focus on the market rather than the organization itself.

4. A service-oriented, rather than a product-oriented, approach.

5. A more open attitude towards competition.

6. More flexible internal organization serving to optimize decision-making(13).

Marketing may also be defined as a 'methodology for problem formulation'(14) and, in this connection, it may perhaps enable information services and their staff to find their place in society. For it is an odd fact that such personnel have not yet acquired a social status commensurate with their role in what is generally referred to as 'the information society'.

For some years, the world of information has been in ferment, with an unprecedented increase in the number of data banks, a growth in the number of micro-computers, more human resources invested in information, the development of popular communication technology etc. But information services both traditional and non-traditional still remain comparatively under-utilized(15). Hopefully, marketing will help to resolve these problems.

Notes on the introduction

1. Blanche, B. Introduction au nouveau marketing. Paris, Dunod Entreprise, 1979, pp. 9-11.

2. Lambin, J. Le marketing stratégique. Fondements, méthodes et application. Paris, McGraw-Hill, 1986, pp. 1-3.

3. Darmon, R.Y. et al. Le marketing. Fondements et applications. Montreal, McGraw-Hill, 2nd edition 1982, p. 20.

4. Serraf, G. 'Proposition pour définir un véritable marketing des problèmes sociaux', Revue française du marketing. Cahier 60 (January-February 1976), pp. 48-49.

5. Lindon, D. Le marketing. Paris, Fernand Nathan, 1981.

6. Lexique de gestion. Paris, Dalloz, 1986, p. 142.

7. Dixeco de l'entreprise. Paris, Dunod, 1980, p. 107.

8. In the category of 'information specialists' we include librarians, documentalists and archivists as well as information brokers, in line with Unesco's policy of standardization and the definition by Daniel Reicher in his article 'S.I.D. 2000' published in Argus, Vol. 8, 1979, No. 1, pp. 17-22. For the same reasons we use 'information srvices' to designate the various types of services in which those specialists work.

9. See, in particular: Tixier, D. 'Marketing et bibliothèques', Bulletin de l'Association canadienne des bibliothécaires de langue française, V.17, 1971, pp. 111-121.

10. Kotler, P. and Levy, S. 'Broadening the concept of marketing', Journal of Marketing, V.33, 1969, pp. 10-15.

11. Pommart, P.-D. 'L'Etat et le marché de l'information', Documentaliste, V.23, 1986, pp. 175-179.

12. Cronin, B. 'Information services marketing', South African Journal of Library and Information Science, V.53, 1985, pp. 115-119.

13. Dayan, A. et al. Marketing, Paris, Presses Universitaires de France, 1985.

14. Serraf, G. op. cit. p. 57.

15. Tenopir, C. 'Why don't more people use data bases?', Library Journal, v. 111, 1986, pp. 68-69; Sévigny, M. 'De l'or qui dort en banque', Le devoir économique, V.3, 1987, pp. 42-44.

2. THE COURSE OF STUDY

2.1 Aims of this document

The aim of this document is to describe in broad terms the marketing approach and the ways in which it may be included as a component in the training of information specialists.

The main part of the document (Chapter 3) sets out in six modules the possible content of such training, the training objectives corresponding to each module, examples relevant to the situation of information specialists, a number of exercises to accompany the course and some suggested reading for tutors and for students wishing to continue their training independently. The six modules cover all the components necessary to enable students who have followed the course to apply marketing principles in different types of information services. All the basic ideas are therefore introduced. Teachers in different countries may use these basic notions to develop a fuller course and one which is more closely attuned to their particular situation.

The modules are presented in the order most conducive to the gradual acquisition of a basic knowledge of marketing, i.e. moving from general concepts to an explanation of specific concepts. Teachers may alter this sequence at any time for specific educational reasons. For example, the last module deals with the 'marketing plan' since it is a stage at which all of the basic ideas find practical expression. But the components of the marketing plan may be introduced immediately after basic marketing ideas if, for example, it is intended that students should prepare a marketing plan as an exercise in the course of their training. Similarly, some components may be introduced at the start to capture the interest of participants - for example, some good instances of advertising in the field of information.

The content of these guidelines is based on the wide experience of the author, who has been responsible for initial training courses at various levels and continuing training for very varied groups in a number of developed and developing countries.

The participants in the marketing seminar held in Geneva from 8 to 10 October 1986 also made a very positive contribution to the preparation of this work.

As far as possible this study has been drafted to take account of the various types of information services. The description of marketing applications also takes account of the political, economic and geographical differences between countries in which they might be put to use.

This section (Chapter 2) describes the teaching environment for marketing courses in schools of information science.

2.2 Structure of the course

2.2.0 Levels of training

Figure 2.1 represents the various training levels for which these guidelines are intended. They involve both initial and in-service training. All the modules may be used for initial training and some of them may be used separately in an in-service training context.

The modules as shown here are intended primarily to make students aware of or familiar with an area of which they have little or no prior knowledge. However, each module may be developed to provide more advanced training for

students, in second training session for example, after which those concerned should be in a position to apply the principles they have learned in genuinely operational fashion.

Figure 2.1: Possible training levels

	Initial training	In-service training
Awareness/Familiarization	30-45 hours of compulsory courses 1st year	1-5 days
Operational Application	30-45 hours of courses with options 2nd year	5-15 days (fairly intensive)

2.2.1 Initial training

The marketing approach makes students of information science more aware of the importance of taking the user and his needs into account in the management of an information service. It also provides them with a basic understanding of strategic planning essential to all modern managers. In management training schools, marketing may be taught in several courses over several hundred hours. Such schools regard marketing as a special discipline that has developed greatly in the last ten years.

However, marketing courses in management school seem to be mainly aimed at manufacturing and industrial companies. Since it is highly desirable for information specialists to receive a form of marketing training geared to service organizations, particularly non-profit service organizations, it would be preferable if they were to receive such instruction along with their basic training, that is, during their course of study at an information science school.

It is a moot point whether all students in information science schools should be required to study marketing; the answer may depend on the policies applied in each country. At all events, our view is that it is an extremely important if not a fundamental component of all the other activities carried out by an information service.

For that reason we strongly recommend that this subject should constitute a separate course in all information science schools. These schools should at least provide an introductory course for all students and an opportunity for those most interested to specialize in the subject.

Another way of meeting this requirement in part would be to teach marketing in conjunction with another subject already included in the curriculum. For example, a course on management and administration could include a certain number of lessons on the marketing of information services. But because the syllabus of the more traditional training courses for information specialists is already very full (planning, organization, management, control, budgeting, staff management, etc.), a separate marketing course would generally be advisable.

Another possibility would be to integrate the marketing approach in user surveys if such a course is already on the curriculum. As we explained in the introduction, user surveys lead naturally to a marketing approach. We have found that marketing adds a practical dimension to courses on user surveys and is therefore much appreciated by students(1). This practical dimension is present because marketing makes it possible to incorporate the results of use surveys in the planning of information services. Such surveys seem too often based on a strictly methodological approach and are therefore completely dissociated from their management information function.

It is suggested in the present study that marketing should be considered as generic in relation to user surveys, i.e. that such surveys should be seen as a branch of marketing. Module 3 accordingly introduces survey methods under the heading of 'marketing research'.

As the content of this marketing research component is relatively dense (survey methodology, methods for the collection and processing of data, statistics) it would be quite in order to think in terms of a course structure comprising a compulsory introduction to the basics of marketing (including research concepts) followed by another course involving specialized options, which would deal specifically with market research and analysis.

2.2.2 In-service training

Just as it is essential for new members of the profession to become acquainted with modern marketing techniques so it is essential for those already in work to learn about this approach. As the importance of marketing for information services has only very recently been realized, provision for in-service training must be made for specialists who received their initial training some years ago or who never received formal training in the field of information.

In most countries in-service training is undertaken by professional associations, sometimes in co-operation with institutions providing initial training. Some private bodies have also begun to provide in-service training courses in the field of information science.

Several in-service training courses on the application of marketing to information services have already been held in various countries. In most cases these courses have merely presented basic marketing concepts and explained the uses of marketing. These basic principles can easily be covered in a single day.

Some courses have also been held to present a specific aspect of marketing, such as the advertising of documentation and information services or market analysis methods. The duration of such courses may vary according to the theoretical level called for and the amount of practical work involved (group work, practical applications, etc.).

There is, however, an increasing demand from those working in this area for structured marketing workshops extending over at least two days at which participants can study the marketing concept in depth and at which the application of marketing to information services is demonstrated by instruction in strategy formulation and the preparation of a marketing plan.

As indicated above, the course content proposed in this study is divided into a number of modules which, individually or in groups of two, can provide topics for in-service training courses. Basic concepts will, of course, be a prerequisite for the more advanced modules.

2.3 Number of course hours

It is difficult to speak of a required number of course hours, but the marketing concepts put forward in this document could not reasonably be assimilated in less than 30 hours of classes, to which should be added roughly twice that time for individual reading and back-up work by students. Moreover, it should be clearly realized that students will then have no more than an introductory-level grasp of marketing. They will nevertheless be in a position to apply basic marketing principles in their daily work, albeit imperfectly at first, naturally.

Obviously, training can be more effective if the course is spread over a longer period of time and the trainee groups are smaller (10 or 12). Where training is stretched out over several weeks students have a better chance to assimilate the material properly and thus retain it. With a smaller group of students the subject-matter can be explored in a much livelier fashion, thereby helping participants once again to absorb it more effectively.

By way of example, the School of Librarianship and Information Sciences of the University of Montreal provides for 45 hours of tuition in the basic course on the marketing of information services, plus 90 hours of additional work by the student at home, in the library or as part of a team. The content is very similar to that suggested in the following chapter but includes some extra components on the application of marketing in the Canadian setting.

In this particular institution, the marketing course is compulsory for all first-year students and therefore caters for at least 60 students. Students however, work in small teams of three to five, the problem of large groups being in this way avoided. Moreover, second-year students have the option of choosing another course enabling them to study marketing concepts in greater depth. But, as explained earlier, we shall confine ourselves here to describing the basic components, which teachers in different countries may develop as they wish, particularly where specialist courses are concerned.

2.4 Prior qualifications needed

Strictly speaking the study of marketing as applied to information services does not call for any prior qualifications. Naturally the learning process will be speeded up if students have a first-hand knowledge of the field. They will then find it easier to relate theory and practice.

A basic knowledge of management and administration could also help students to assimilate marketing ideas more rapidly and more effectively.

We have had experience of teaching marketing to a variety of groups (long-standing or new members of the profession, students with or without previous knowledge of management or the information sciences) and we have observed that receptivity to the concept is universal, irrespective of the level of the students. Beginners may even be said to be more receptive - doubtless because of the innovatory aspect of applying marketing to information services, an idea that can encounter resistance among more conservative managers. Some slight adaptation on the part of the teacher will generally be necessary to suit his particular audience.

2.5 Teacher qualifications

Finding someone to teach the marketing of information services may prove difficult for some training schools. The person concerned must not only have a knowledge of marketing but must also be familiar with the environment in which information specialists work. The ideal combination would clearly be a

mixed background in management and information. Someone possessing, for example, an M.A. in Administration (M.B.A. or equivalent) and an M.A. in Information Science would be an asset for a training school, particularly if he or she had already worked or had experience in the information field. Because of the present tendency for training to be provided at the higher level (M.A. or above), teachers are increasingly required to possess research skills, as attested usually by the holding of a doctorate.

A knowledge of information services is particularly important since - as we have already pointed out - traditional training in marketing is generally focused on manufacturing and industrial companies whereas the application of marketing to service organizations, particularly non-profit service organizations, has certain specific features.

In the case of a teacher offering an advanced course on the marketing of information services aimed at a well-informed audience, knowledge of the information field would be less essential as the students themselves could make the necessary adaptation. In such a case, however, the teacher should at least be aware of the distinctive features of marketing when applied to service organizations.

2.6 Teaching methods

Marketing should not be considered solely as a technique but also as a philosophy of management. It must therefore be taught using flexible teaching methods which provide opportunities for the students to discuss and comment on the material.

In this connection teachers are advised to make use of interactive methods which encourage exchanges between the teacher and his students and between the students themselves. In accordance with the subjects discussed in the different modules, various approaches are suggested in these guidelines, particularly in the 'evaluation exercise' section at the end of each module.

For example, the case method may produce profitable exchanges between the teacher and the students and also between the students themselves. Much use is made of this method in the teaching of marketing in management schools. However, there are practically no cases available for the discussion of situations in the information field. Teachers must therefore compile the cases they require for their teaching, which involves a considerable investment of time. It does however provide them with cases which actually correspond to local work situations. Teachers can also draw on previously published cases(2). Annex 1 provides an example of a case-study on the marketing of information services.

Students may also use real cases to discuss the theoretical principles underlying the course. Such discussions may be set up by inviting people working in the information field to explain the situation of their organization and then discussing the practical problems they encounter in their work environments.

Tutors may also devise simulations or role-playing games, whereby students are placed in an imaginary context involving very specific professional situations in which - for example - they have to play the role of a particular manager.

Teamwork by students is also a good idea. Indeed, the use of marketing techniques in work contexts generally involves teamwork.

An audio-visual approach is very effective and is often more successful in holding students' attention. It is also an appropriate technique for demonstrating the applications of marketing, for example when it comes to introducing the concepts of advertising and promotion. Whenever possible, audio-visual documents should be made available at the end of each module.

2.7 Basic equipment and documentation

Certain equipment is necessary if the teaching methods suggested above are to be used.

Depending on the type of audio-visual document employed, this equipment will include a projector, an overhead projector, and a video unit with a sufficient number of monitors.

Lecture rooms should also be equipped so as to allow proper viewing of audio-visual documents, e.g. with curtains so as to shut out the light if necessary. Lecture rooms should be multifunctional as far as possible to enable the above-mentioned exchanges between students to take place. Ideally, small rooms should be available for teamwork.

It is also a good thing for students to have access to a library where documents on marketing in general and, of course, the marketing of information services in particular are available.

There are several monographs on the marketing of information services, but most texts have been published in the form of articles in the specialized journals. If students already have access to a library specializing in the information field, they should be able to find those texts among its collection.

With regard to marketing in general, students would be advised to obtain copies of the limited number of textbooks on the marketing of non-profit service organizations (see bibliography).

2.8 Student assessment

In the case of initial training the university or training institution authorities will generally require students to be assessed. Such appraisal will be more effective if it is not based on a single mode of assessment. Thus the teacher may employ a written exam together with a group project extending over a semester. The result will be an individual assessment and a group assessment.

In the case of group work, it will, however, be necessary to ensure that all members of the team pull their weight as each member of the group will receive the same mark.

Another possibility would be to reserve a certain percentage of marks for continuous assessment of the student's classroom performance, which can sometimes be an added source of motivation for students.

Assessment of students should also help the teacher to discover if he has managed to put across the material. As a further check, the teacher could also distribute a teaching-evaluation questionnaire to students at the end of the course.

In the case of in-service training, summative evaluation may not be necessary. It will, however, be important to carry out a formative evaluation of the course to see if the teaching can be improved. This could be done by means of a discussion with participants or an anonymous questionnaire.

Notes on chapter 2

1. Savard, R., 'L'approche marketing dans l'enseignement des méthodes d'enquête sur le terrain', in Actes des quatrièmes journées d'étude de l'AIESI, 24-29 avril 1984, Rabat, 1985, Ecole des sciences de l'information, pp. 131-140.

2. Lovelock, C.H. and Weinberg, C.B., Public and non-profit marketing: cases and readings, New York, Wiley, 1984.

3. THE COURSE CONTENT

3.1 MODULE 1: The marketing approach as a management tool in the context of information services

GENERAL OBJECTIVE:

To promote an awareness of the importance of marketing for information services.

SPECIFIC OBJECTIVES:

On completion of this module the student should be in a position to:

1. understand that information services function as open systems;
2. define marketing;
3. explain the development of the marketing concept;
4. identify the components of the marketing mix.

3.1.1 The information service as an open system

In order to fully understand the importance of marketing for information services, it is essential to realize that they function as open systems. We are drawing here, of course, on Bertalanffy's systems theory(1).

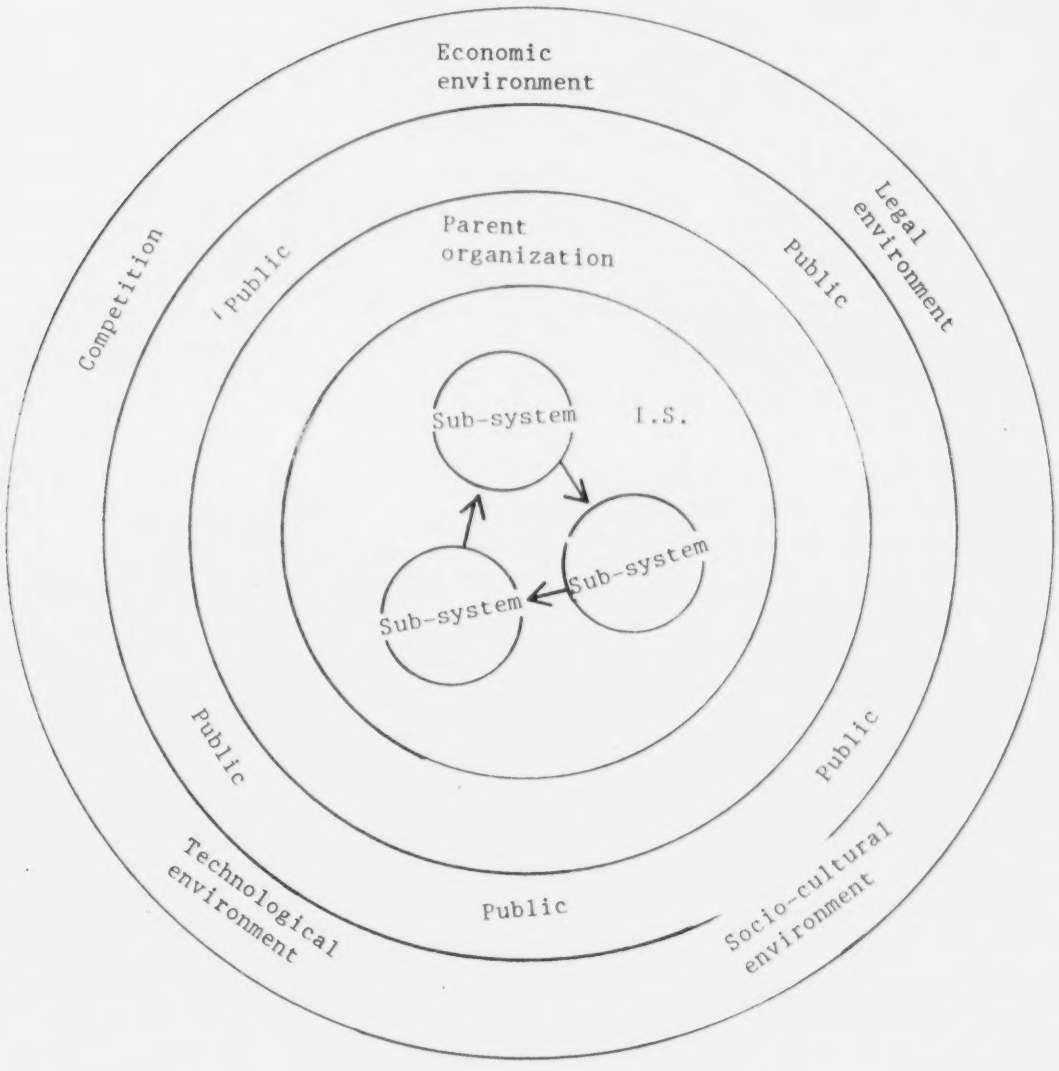
Information services have often been described as systems that depend on their environment. Thus, Speller clearly explains the functioning of information services as systems taking the example of the university library(2). Figure 3.1 illustrates this dependent relationship by means of concentric circles: the information service, which is itself composed of subsystems, operates in a wider context (the parent organization) to which it gears its functioning. This wider context may be a university, a large firm or a government ministry. The service thus defines its goals and objectives in terms of the role assigned to it by the parent organization, and it must also take account of the requirements of its different customers and of the external environment.

In order to appreciate this dependence on the environment, we need only consider the financing problems experienced by information services in periods of economic crisis: all too often the first budgets to be cut by the funding bodies are those of librairies or archive services. The same is true of documentation centres in the private sector where the first reaction of a company experiencing financial difficulties will often be to abolish that service. As for profit-making information organizations, the absence of customers sooner or later spells bankruptcy.

The problem is that the final product provided by information services is not always seen as essential, wherein lies the potential drama of this dependent relationship on the environment. The service receives resources from its environment and in exchange it must supply a product or service that is useful, and of course 'visible', to that environment.

In recent years information services have realized that they must rationalize their operations if they wish to prosper and even, in some cases, to survive. Somewhat curiously this realization has come at a time when the need for information in society is more keenly felt than ever before. Nevertheless, managers appear to be finding it more and more difficult to justify the scale of their services. Faced with this paradox which forces them to manage growth in a context of contraction, administrators have turned to modern methods such as marketing.

Figure 3.1: The I.S. as an open system



3.1.2 What is marketing?

As we stated in the introduction, marketing is a 'complex function' and has, therefore countless definitions. In his Dictionary of Marketing and Advertising, M.J. Baker ascribes this situation to the newness of the concept(3). He states that marketing is an emerging discipline which does not yet possess a solid core of theory, a fact which could explain the many definitions. However, Baker maintains that there are a number of affinities between all these definitions.

Lovelock and Weinberg, two experts in the marketing of services, define marketing as the management function which links an organization to its external environment(4). Although this definition is rather general, it provides a clear explanation of the main aim of marketing.

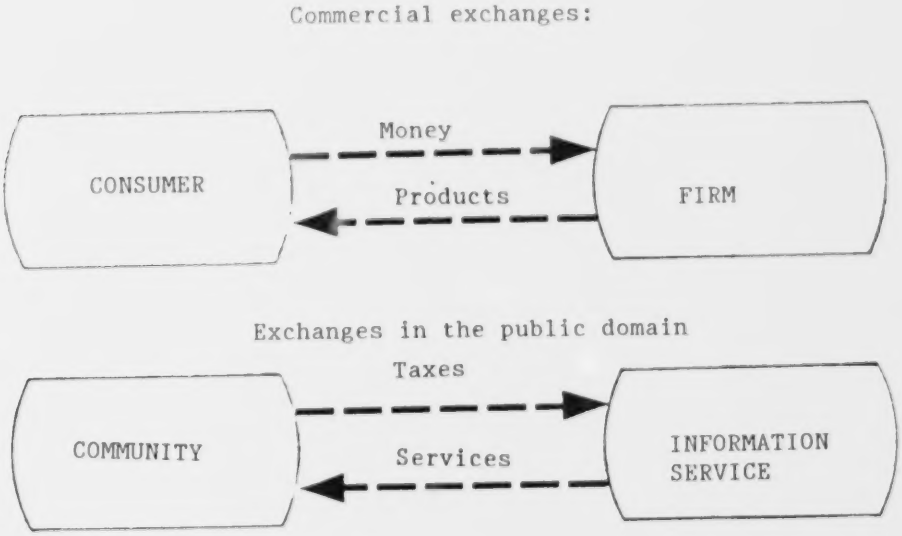
In his Dictionnaire du Marketing, Serraf analyses the concept of marketing as follows: Marketing is a 'coherent, three-pronged system of research, strategy and action... the purpose of which is to identify, anticipate, contact and monitor customers and to cope with changes and developments in the market'(5). Its function, then, goes far beyond mere advertising, which is what some people suppose its role to be.

Blaise Cronin, an expert in information services, has his own definition of marketing which places the emphasis on customer satisfaction - another major objective of marketing: 'Marketing can be summed up as the process of customer-satisfaction engineering'(6).

Philip Kotler, who enjoys undisputed authority in this field, defines marketing in terms of the concept of exchanges as 'a human activity directed towards the satisfaction of wants by means of exchanges'(7).

The idea of exchanges between an organization and its environment may, in fact, be described as the cornerstone of marketing. The marketing approach seeks to rationalize these exchanges and make them as efficient as possible.

Figure 3.2: The exchange process



Irrespective of the type of services which they offer, organizations and firms all develop within a context of exchanges. Obviously these exchanges are more easily discernible in the commercial process where the customer acquires a product in return for a given sum of money paid directly to the seller. But, as shown in figure 3.2, an exchange also takes place when a user has recourse to a non-profit information service to obtain a document or information: the cost of the service is met by the user or the community through taxes. There is always a price to be paid whatever the context of the exchange.

This type of exchange is rationalized in marketing through an active study - highly formal or otherwise - of the needs of different groups of customers. When the study has been completed, managers must ensure that the products or services supplied are made to match observed needs. The exchange will consequently be more effective as it provides greater satisfaction for the users and involves less wasted effort on the part of the organization.

The marketing approach leads to a different conception of management. Before the advent of marketing, managers were in the habit of adopting an approach based almost entirely on the existing product with the aim of achieving economic viability or profits in the case of the commercial sector and 'social' viability in the case of the public sector. Firms and organizations defined themselves first and foremost in terms of their products.

The marketing approach has substantially modified the traditional approach, as may be seen from figure 3.3, inasmuch as the organization's point of departure is no longer the organization itself or the existing product/service but the customer and the satisfaction of his or her needs. The aim remains the same: to make the organization reasonably viable. But this aim can now be achieved much more easily and in a completely different context.

The marketing approach obliges managers to ensure that their organization evolves, since the needs of the customers naturally alter with time, reflecting the similarly changing environment. The key role played by customer need and market analysis in the marketing approach derives directly from this basic principle.

Marketing, then, amounts to much more than most people imagine. Some believe that it is synonymous with advertising or public relations. But that is just the tip of the iceberg, one of the final stages in the marketing process during which the organization communicates with the market after conducting a study of needs and altering its services to meet those needs.

For all of these reasons we have adopted a rather broad definition of marketing which incorporates all the definitions mentioned above.

Marketing may be defined as a management philosophy whereby the organization:

1. actively monitors the needs of its customers (users and non-users);

2. matches itself and its products or services with identified customer needs so as to satisfy them:

3. subsequently makes itself known by communicating with customers;

4. finally, measures customer satisfaction in order to make any necessary adjustments.

Figure 3.3: Differences between a product-oriented approach and a marketing approach in the field of information services

STARTING POINT	PRODUCT-ORIENTED APPROACH	MARKETING APPROACH
Attitude to customers:	Must be content with product offered	I.S. must adjust to their needs
Approach to customers:	Wait until customers turn up	Anticipate customers' wishes
Relationship with customers	Instrumental (as brief as possible)	Helpful and open-ended
Time required to obtain a service/ product:	Depends on technical services and accessions	Depends on customer needs
Services/products supplied:	Only what is available on the spot	Outward-looking network approach
Innovations:	Chiefly designed to lower production costs	Aimed at providing better customer service
Attitude to services/products:	I.S. supplies only what it produces	I.S. endeavours to produce what it should be supplying
Evaluation of information needs:	Restricted: mainly in terms of printed matter	Broad: in terms of information (audio-visual, etc.)
Feedback in relation to service provided:	Mainly concerned with internal efficiency	Mainly in terms of effectiveness with regard to customers

(Note: I.S.: Information Service)

3.1.3 Development of the marketing concept

Yorke states that marketing developed mainly after the Second World War(8), although the idea behind the concept is in fact much older according to Peter Drucker. He traces it back to 1650 in Japan(9), where a certain Mitsui set up the first department store operating on the basis of customer satisfaction. According to Kotler, the term 'marketing' appeared at the beginning of the twentieth century(10).

Large companies selling everyday goods directly to the consumer were among the first to use modern marketing techniques. The 'exchanges' as described above are more apparent in this sector and the importance of optimizing them for the sake of greater efficiency was probably understood more quickly than elsewhere.

Shortly afterwards the world of industry also adapted to the marketing approach, probably around the 1960s.

Following an article by Philip Kotler and Sydney Levy, which was first published in 1969 and has since become a near classic, the concept of marketing was extended to non-profit service orgnizations. It is estimated that hundreds of millions of dollars are now invested annually in the marketing of non-profit organizations, as exemplified by fund-raising campaigns for various social causes. This type of activity whereby marketing - often wrongly seen as an instrument of capitalism - helps to improve the quality of life in our society(11) is now referred to as 'social marketing'.

The world of information services is only now really waking up to this new approach although the first articles to appear on the subject in the specialized journals date from the mid-1970s. Cronin forecasts that marketing will be a completely normal form of management in information services by 1990(12).

Librarians, documentalists, archivists and other information specialists are less and less reluctant to view their services as businesses and are employing the necessary means, including marketing, to ensure their development and improve their visibility.

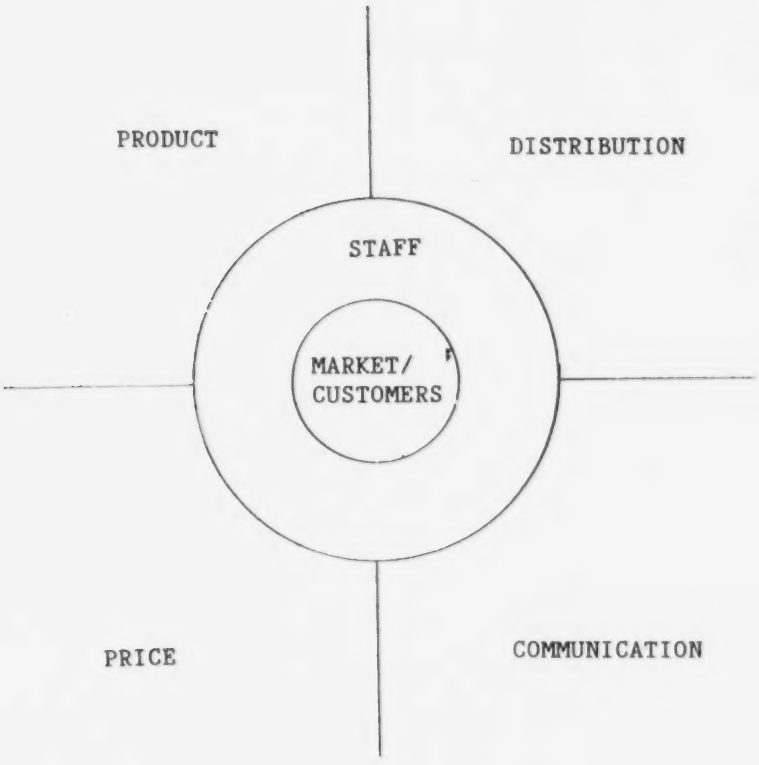
3.1.4 The marketing mix

This important concept underlies all marketing strategies. We shall come back to the ingredients of the mix in Modules 4 and 5, but in order to have a clear understanding of marketing the various components must be briefly introduced.

Figure 3.4 illustrates the ingredients of the marketing mix. There are five main elements, which converge - as they should - on the centre of all marketing management, i.e. the market, comprising actual and potential users. In order to serve a market more effectively the manager must identify in relation to each of the five elements those features which will best satisfy that market. This careful mixture will constitute the core of the marketing strategy.

This first element of the marketing mix is the product. In the information field we should perhaps speak chiefly of services since what is supplied to the market usually takes the form of non-material products. One thinks, for example, of the reference facilities provided by an archives service, the bibliographical service provided by national libraries or the referral services provided to users in university libraries.

Figure 3.4: The marketing mix



The second element of the marketing mix involves all aspects of the distribution of the product or service concerned. This is a rather complex element in the case of information services, distribution covering the entire concept of access to the service. It therefore includes: the opening hours of the centre, its location, the rules for the lending of documents, etc.

The third element is relatively new as its importance for the development of strategies has only recently been realized. This element is the staff, without whom - when all is said and done - satisfactory exchanges with the public are difficult to achieve. That is why marketing experts now talk about 'internal marketing', emphasizing that the entire staff must be at all cost and feel themselves involved in the organization's marketing strategies.

Price is the fourth element in the marketing mix. As we have already said, there is always a price to be paid in information services, even where public bodies are concerned. Furthermore, some non-profit information services faced with financial restrictions have recently adopted a policy of charging for some of their products. At the level of strategy the manager must examine seriously the various pricing options and select the one which will prove most satisfactory to potential users.

Marketing communication, principally advertising, constitutes the last element in the marketing mix. The manager must decide at this stage the best way of communicating with the market to inform it of his products and services, their special features and where applicable their price.

The marketing strategy will therefore be based on these five elements and on their many facets. Managers must achieve the right balance between these ingredients in the light of market requirements, bearing in mind that they are all interrelated. Even if the general shape of a new service has been well researched and responds effectively to customer needs in terms of the product, the operation may be completely sabotaged by a poor decision on pricing or by unsatisfactory distribution or poor staff training.

Once this overall strategy has been established it will provide a basis for the planning of the information service; in other words, all of its activities will be conducted on the basis of the strategic decisions stemming from the marketing mix. The marketing plan (module 6) will provide a detailed breakdown of all the strategic decisions.

3.1.5 Suggested reading

Bon, J. and Louppe, A., Marketing des services publics: l'étude des besoins de la population, Paris, Editions d'organization, 1980. Chapitre 1: Le concept marketing et l'étude des besoins.

Flippo, J.P., Le management des entreprises de services, Paris, Editions d'organisation, 1984. Chapitre 3: Les spécificités du marketing des services.

Kotler, P., Marketing for non-profit organizations, Englewood Cliffs (N.J.), Prentice-Hall, 2nd ed., 1982. Chapter 1: Marketing's role in non-profit organizations; Chapter 2: The responsive organization: meeting consumer needs.

Lovelock, C.H. and Weinberg, C.B., Marketing for public and non-profit managers, New York, Wiley, 1984. Chapter 1: The role of marketing; Chapter 2: Understanding and contrasting the public and non-profit sectors; Chapter 3: Exchanges in non-business marketing.

Serraf, G., 'Propositions pour définir un véritable marketing des problèmes sociaux'. Revue française du marketing, No. 60, 1976, pp.46-83.

Speller, B.J., 'Living in an open system: the individual and the library organization'. Journal of Library Administration, V.5, 1984, pp.41-52.

Qu'est-ce que le marketing? Film cinématographique, 15 min., Paris, Centre audio-visuel de l'entreprise.

Edinger, J.A., 'Marketing library services: strategy for survival'. College and Research Libraries, V.41, 1980, pp.329-332.

Levitt, T., 'Marketing myopia', (in French), Direction, No. 150, 1968, pp.546-573.

Lundu, M.C., 'The marketing of information in Zambia: the views of a Zambian librarian'. Infomediary, V.1, 1985, pp.17-30.

3.1.6 Evaluation exercise

To enable students to check whether they have fully assimilated the basic concepts in Module 1, it is suggested that they be given an objective test consisting of 'true or false' or multiple-choice questions. Such tests (which can be adapted, if necessary) may be found in Les fondements du marketing moderne: guide de l'étudiant, by D. Pettigrew and N. Turgeon (Montreal, McGraw-Hill, 1985), or in Le marketing: guide de l'étudiant, by M. Lessard (Montreal, HRW, 1984). Annex II reproduces a test of this type adapted to the marketing of information services, in which the first questions relate to Module 1.

Notes on Module 1

1. Von Bertalanffy, L., Théorie générale des systèmes, Paris, Dunod, 1973.

2. Speller, B., 'Living in an open system: the individual and the library organization', Journal of library administration, V.5, 1984, pp.41-42.

3. Baker, M.J., Dictionary of marketing and advertising, New York, Nichols, 1984, p.120.

4. Lovelock, C.H., and Weinberg, C.B., Marketing for public and non-profit managers, New York, Wiley, 1984, p.12.

5. Serraf, G., Dictionnaire méthodologique du marketing. Paris, Editions d'organisation, 1985.

6. Cronin, B., 'Information services marketing', South African journal of library and information science, V.53, 1985, p.115.

7. Kotler, P. and Dubois, B., Marketing management, Paris, Publi Union, 1980, p.18.

8. Yorke, D.A., Marketing the library service, London, Library Association, 1977, p.7.

9. Drucker, P.F., Management: tasks, responsibilities, practices, New York, Harper and Row, 1973, p.62.

10. Kotler, P. and Turner, R.E., Marketing management, Scarborough (Ontario), Prentice-Hall, 1981, p.7.

11. Serraf, G., 'Propositions pour définir un véritable marketing des problèmes sociaux', Revue française de marketing, Cahier 60, 1976, pp.46-83.

12. Cronin, op. cit.

3.2 MODULE 2: Marketing and behaviour patterns in the information field

GENERAL OBJECTIVE:

To understand the importance of information-seeking behaviour for the marketing of information services.

SPECIFIC OBJECTIVES:

On completion of this module the student should be in a position to:

1. understand that a number of factors may influence information-seeking behaviour;
2. define certain typical patterns of information-seeking behaviour;
3. define certain important concepts in the study of information-seeking behaviour.

3.2.1 Why information-seeking behaviour is important

A knowledge of information-seeking behaviour in different markets is increasingly important for managers who have adopted a marketing approach. As the aim of marketing is to satisfy customer needs it is essential to discover how customers operate, how they make their choices when they have to acquire information, why they may or may not decide to consult an expert, how they behave when faced with an information problem, etc.

This question of 'consumer' behaviour is crucial in marketing theories and all the basic works treat this subject in detail.

Consumer behaviour is influenced by a number of factors which need to be identified. They include sociological factors: age, sex, educational level, etc. Some products and services are not intended for everybody, and it is essential to know in advance which section of the market may be attracted by a specific product.

Culture and attitudes are other factors which affect the decision as to whether or not to make use of information services. For example, the image some people have of libraries, the way in which they perceive them, will often determine whether or not they make use of their services.

Life-styles and socio-economic categories are other factors that have a definite impact on the way people obtain information, i.e. whether they operate independently or whether they rely more on help from others - to interrogate data banks, for example.

Naturally all these factors vary from one context to another, from one country to another and from one continent to another. It is none the less possible to identify certain patterns of information-seeking behaviour from the many studies completed to date. Knowledge of these patterns may be of great use to managers, even if they should always relate and adapt these basic principles to their own context and preferably carry out their own market analysis in order to identify the special characteristics of the various user groups.

3.2.2 Patterns of information-seeking behaviour

Research on patterns in the information field may be divided into two main categories depending on the approach employed by the researcher. The first category comprises studies relating to existing information services, and the second comprises studies relating to the activities of users, without reference to information services.

The first category therefore comprises studies relating to different types of institution (archive services, university or public libraries, etc.).

The second category comprises studies relating to the spheres of activity of users, whether expressed in terms of disciplines (science, social science, human sciences) or in economic terms (firm, professional worker, work environment). Researchers agree that information-seeking behaviour varies considerably from one discipline to another and in different types of economic activity. These two subcategories are moreover characterized by entirely different forms of information-seeking behaviour.

It is also possible to speak of a third category consisting of studies on the use of new information products as exemplified by data banks and forms of electronic access to information.

These three categories are not mutually exclusive however.

We shall now briefly review each of these categories, mentioning some research findings, which are not to be regarded as exhaustive.

The institutional approach is perhaps more closely linked to traditional library science, in which a great deal of research has been done on the use of different types of libraries.

For example, several studies have been made of the use of public libraries, particularly in English-speaking countries. Excellent surveys based on the results of these studies have been published by Zweizig and Dervin(1) and also by Harris and Sodt(2).

Public library attendance rates may vary enormously depending on the way 'public library use' and 'type of use' are defined. According to Zweizig and Dervin the 'real' user visits a library at least once a month. On this definition of use, library use rates vary between 10 and 25 per cent, i.e. between 10 and 25 per cent of the total population use public libraries. If the scope of the definition is wider, for example if all those using a library at least once in the past year are considered as users, then library use rates may rise to 60 per cent. However, the situation varies enormously from one region to another and from one country to another. In a study conducted in France all individuals enrolled in a public library were considered as users and accounted for 10 per cent of the total population(3).

The type of use observed also has an impact on library use rates. In general, studies have been concerned with the traditional - mainly leisure - use of libraries: visits to libraries, reading on the premises, book borrowing, etc. The figures quoted above refer to this type of use. Zweizig and Dervin state that the use of libraries for information purposes is much more limited: less than 5 per cent of people mention the public library as a source in their search for information of whatever kind, even though some studies show that members of the public have considerable needs in this area.

The factors most closely linked to a high library use rate are educational level and socio-economic level (the two factors are generally interrelated). Some studies also show that the typical public library user is very socially active, with well-established reading habits.

It has also been observed that factors such as a greater variety of media for carrying information, appropriate locations for libraries and longer opening hours generally tend to increase public-library use.

According to Elia, the typical market for public libraries is composed of three categories: actual users, non-users who are active readers and 'hard-core' non-users(4). The second group represent a promising market and may fail to visit libraries solely as a result of ignorance or a misunderstanding of their services.

The customers of university libraries constitute another much-studied population. However most studies of the university environment are based on specific institutions and, to the best of our knowledge, there is no account of the subject which summarizes the patterns observed. These patterns are actually much more uniform than in the case of public libraries as the customers in educational establishments constitute a captive clientèle. Furthermore, each university has its own study and research programmes to which the development of library services may be geared.

It is generally agreed, however, that there are three major types of customer for university libraries: faculty, graduate students and undergraduates. Rzasa and Moriarty show that these three types of customer exhibit rather different forms of behaviour(5). Faculty tended to use the library for their research and publications, graduates were looking for material connected with a course, and undergraduates often visited the library to work there with their own books. The types of documents used by these three categories did not appear to be the same: faculty and graduates mainly used periodicals while the others tended to restrict themselves to monographs, probably because basic textbooks are the chief requirement at their level.

Research generally indicates a rather high library use rate: in the study by Rochard, 81 per cent of respondents said that they visited the library at least once a month(6) and Ford mentions average weekly use rates of between 5 and 11 hours(7).

Some authors such as Malley(8) indicate that full-time and part-time students sometimes exhibit different use patterns. Futas and Vidor(9) showed in their study of library use by management students that full-time students used three times as many journals as monographs, a proportion which was completely reversed in the case of part-time students. According to the authors the reason for this might be the inflexibility of the rules governing the loan of periodicals.

School libraries are another context in which use patterns have been studied, although to a lesser extent than in the first two contexts mentioned. Bernhard summarizes the latest research on the subject and states that this type of library is generally underused by both students and faculty(10). The use made of them appears at present to be restricted to monographs.

The use of archive services also presents some special features, although little research has yet been done on the subject. Delmas states that there are two types of archive users who, in fact, correspond to the two possible categories of archive service: the 'compiler/user' retrieving documents for legal, fiscal and other administrative purposes from 'administrative archives'

not open to the public and the 'reader/user' seeking information from 'historical archives'(11). The first category mainly consists of managers while the second includes a sizeable percentage of historians and history students.

Taylor explains that the prime need of the archive user is to 'understand the process' so that he can then make use of the collection that interests him(12). The tension between archivist and the user stems mainly from the classification scheme adopted for the collection, which generally depends on the provenance of the collection.

Several studies have also been made of specialist libraries and documentation centres but the patterns observed relate more to the disciplines in which the users concerned operate and therefore fit better into the second category of research described below.

As we have already seen research on patterns based on spheres of activity is divided into two subcategories: studies relating to different disciplines and studies relating to economic categories. Discipline-oriented research has established that there are three major types of behaviour, although considerable variation may sometimes be observed within each of these types.

Science (chemistry, engineering, informatics, mathematics, medicine, physics, etc.) is undoubtedly the sector that has suffered most from the explosion of documentation because of the precarious nature of information in that sphere. More research has also been done on this group of customers.

It shows that the information which they require must be provided rapidly since the time factor is particularly important for researchers in the pure sciences(13). They mainly make use of journal articles - and less frequently monographs(14) - presumably because they are generally more up to date. There has been virtually no growth in the number of monographs published in the pure sciences(15). On the other hand, underground literature (reports, unpublished theses, etc.) appears to be in high demand(16). On the whole, it is estimated that people in the sector spend 20 to 25 per cent of their time looking for information - a figure which is quite considerable(17).

Lastly, it should be pointed out that oral communication between contributors is very important: particularly telephone conversations and contacts at scientific conferences. Although this type of communication is informal by its very nature it is generally conducted within well-defined networks, which has given rise to the concept of 'invisible colleges'(18). Bornes points out that 'the marked preference for orally communicated scientific information is basically due to its specific characteristics which make it incomparable: it is, in fact, immediate, sifted, accessible and complete'(19).

It is much more difficult to delimit the social science sector than the science sector, even to the extent of identifying the subjects which it covers. A study carried out by the International Federation for Information and Documentation makes mention of a Unesco document which includes in this sphere: anthropology, demography, law, education, ethnology and ethnography, geography, management, linguistics, psychology, political science, economic science and sociology(20).

This field is in a state of constant change, and behaviour patterns increasingly resemble those to be found in the pure sciences. At the same time only a limited amount of research has been carried out on this clientèle which appears to be more concerned with books than its counterpart in the pure

sciences(21). Monographs are apparently as much in demand as journals: Meyriat states that 11 articles are cited for every 10 books whereas the ratio in the sciences is 80 articles for every 10 books(22).

The type of information required in the social sciences is often statistical, numeric, methodological or conceptual(23). It should also be noted that a multidisciplinary approach appears to be of great importance in that sector(24). The sector of the humanities comprises other subjects (arts, history, languages and literature, philosophy, religious studies, etc.) in which information-seeking behaviour patterns are generally quite different. Time is much less important for these users and the documents they require are not necessarily recent publications(25). This category also contains the largest users of monographs. They are generally much more dependent on the library or documentation centre, which fulfils the role of a laboratory for them(26). They often consult very large numbers of documents and make regular use of the inter-library loan service(27).

These users mostly adopt a much more individual approach, working alone and carrying out their own bibliographical searches and reviews of the literature, something which does not occur in the sciences and the social sciences(28).

Research on information-seeking behaviour in relation to categories of economic activity rather than disciplines has mainly been based on the business firm.

Most authors agree that there are two types of information within a firm: internal information, which is mainly used for management purposes, and external information, which assists decision-making both on the management side and on the scientific and technological side. White tries to establish a certain typology for the transfer of information in a work context(29). In his view the various information needs in a work context form a continuum running from the very general to the very specific. He advances the theory, which has not been proven however, that some departments in the firm need more general information, which he refers to as 'strategic information', while others require more specific information, which he calls 'operational information'. Thus departments such as production or accounts need more general and internal information as they are responsible for the day-to-day supervision of the firm's operations. Departments such as marketing, on the other hand, (and one might add R&D) are more likely to have need of strategic information because their work is concerned with medium- and long-term planning.

In spite of a relatively high information requirement (one study has shown that the search for information might occupy up to 32 per cent of the available time)(30), Trott emphasizes that there is no automatic reaction in firms to approach the various existing information services(31). This point is also confirmed by Slater(32). The problem could be a lack of awareness of the services available, as attitudes towards information services seem to become increasingly favourable with experience and lead to increasing use(33).

Another approach appears to be taking shape in relation to research on information patterns. This is research on the use of the new technologies in information-seeking behaviour.

Although the first data banks were developed at the very beginning of the 1960s, i.e. almost 30 years ago, they are apparently not being used to their maximum potential(34). Several studies have tried to explain this resistance.

The problem appears to be one of 'product distribution' linked to the difficulties of using data banks (need for equipment and familiarity with inquiry software) and to the associated cost problems: the idea of paying for information has not yet been generally accepted(35).

Moreover, as the presence of an intermediary is practically always necessary, the spread of data banks has generally been limited to university libraries (around 80 per cent according to the study by Wanger and Cuadra(36)) and to certain specific sectors (law stock exchange, etc.). Hurych(37) and Winship(38) have described the situation in the university context. It appears that the patterns observed correspond quite closely to the general patterns of information use analysed above under the various sectors of knowledge. Scientists are generally the biggest users of data banks, particularly in medicine. Next come the social sciences and then the humanities. This last category of users still seem to be relatively uninterested in computers and a special effort must be made to persuade them to use data banks.

Graduates appear to be the category that makes most use of data banks, followed by faculty. A study conducted by the Association for Research Libraries states that over 40 per cent of university teachers in North America have already used data banks(39).

There appear to be fewer studies of the use of data banks in business. It is possible, however, that they are used quite frequently when available: according to a recent survey conducted in France, some 60 per cent of the research staff at one institute had already made use of them(40). Managers make much less frequent use of data banks, however, according to the study by Futas and Vidor who state that they were used by only 25 per cent of the graduates of a certain management school(41).

While all this research can provide managers with important information about information-seeking behaviour and thereby contribute to decision-making, it is still important for managers to realize that local studies taking account of the economic and social situation in each case will always be more relevant. Module 3 explains how to carry out individual studies.

3.2.3 Key concepts for the study of information-seeking behaviour

Familiarity with certain concepts relating to the communication of information in information services is essential for a good understanding of information-seeking behaviour. Several theories and models have been developed in this connection, and we shall examine a few of them without making any claims to providing an exhaustive account.

Thus the concept of information need merits close consideration by students of the marketing of information services. It is a much more complex notion than is generally believed because of its quite intangible character. But the need for information is as vital as the need to eat and drink, even for ordinary citizens: '...individuals want to control their own environments. In a modern society such as ours, information is essential to that control. Without information, the individual cannot seek effective help or correct abuses, benefit from the protection and services the government offers, or get the most from his resources'(42).

Research on the need for information shows that it is hierarchical, somewhat as in Maslow's general theory of needs. Indeed, there would seem to be several levels of information needs depending on the individual's awareness of those needs. Totterdell and Bird(43) have shown that there is firstly an 'expressed' need which corresponds to a conscious need and generally leads to a request; a 'non-expressed' need corresponding to a need which is felt but which has not been properly expressed; and a 'non-activated' need which corresponds to a latent need of the individual.

As it is the job of information specialists to satisfy all of these needs they must be extremely vigilant in detecting needs belonging to the second and third categories.

Familiarity with the concept of information transfer is also important for the effective marketing of information services. Brenda Dervin has undoubtedly produced one of the fullest, clearest and the most articulate descriptions(44). Her diagram of the barriers to information transfer (Fig. 3.5) has become a classic. She begins by defining four essential elements in information transfer: the individual seeking information on documentation, the expression of his need, the sources of information and the result of the process, that is to say, the solution or solutions which satisfy the need. Dervin's diagram is universally relevant and may be applied to all information services including archives, where the presence of such barriers has also been observed by Hobert(45) and Taylor(46).

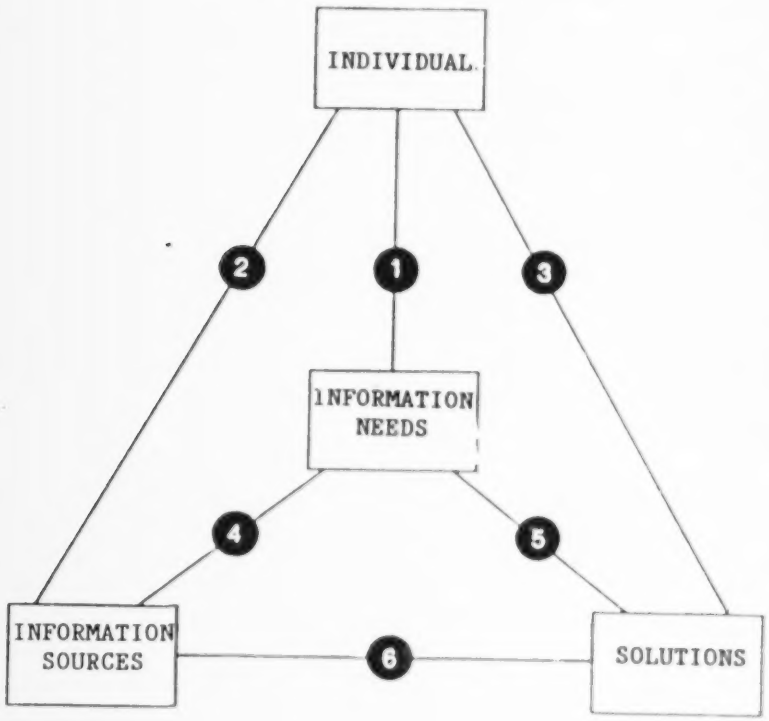
Dervin identifies six barriers to information transfer between each of these four elements. The first barrier has to do with the difficulty of defining the information needs concerned. It arises between the individual and his actual information needs. As we have already explained, people find it difficult to express their information needs clearly.

A second barrier may also stand between the individual and the information sources. For example, the individual may not be aware that this information source or sources exist. He may be intimidated by the staff of the institutions who could provide him with an answer. Excessive bureaucracy within the institution that is the information source may also impair the efficiency of information transfer. It may also be the case that there are quite simply no information sources available. The third barrier between the individual and the actual solutions to his problems may be an intellectual one: e.g., he may lack the education enabling him to understand the information with which he has been provided. In any case, as Dervin emphasizes, the best educated people are generally the best informed. The barrier may also be psychological: for example, the individual, because of some block, may be unable to accept that the information provided will solve his problem or, in a state of despair, he may believe that his problem has no solution.

The fourth barrier stands between information needs and the information source. It relates to the capacity of information sources to satisfy needs in an acceptable manner and within an acceptable time period. For various reasons an information source may fail to interpret the information need correctly or may be ineffective in supplying its services.

The fifth barrier is positioned between information needs and possible solutions. For example, the information itself or the information services may appear to be inaccessible. In fact, the information would be available in most cases were it not for certain imponderable social, economic or political factors that affect the organization of services or even their availability. If no services are available or if the services provided are incomplete, it is unlikely that the solutions required will be found.

Figure 3.5: Diagram by Dervin



The last potential barrier is located between the information sources and the solutions to information needs and problems. It basically concerns the quality of the information provided and the reliability of the sources. Error is human and information is inevitably provided which is false and consequently does not solve the problem or leads only to a partial solution. Dervin's diagram enables us to comprehend the full complexity of the information transfer process. A certain grasp of this process is essential for the application of marketing to information services.

The concept of the satisfaction of information needs is another essential notion for the marketing of information organizations. This term must always be used with care for, as research has shown, there is a tendency to jump to the conclusion that user needs have been satisfied. As we have already shown, information needs are very difficult to evaluate and such evaluations are carried out with varying degrees of thoroughness.

In some cases there may also be what is known as a 'halo effect', which induces customers to express a measure of satisfaction with the service whereas they have not really been satisfied. They may indeed find it difficult to assess the quality of the services provided and to allow in their evaluation for the other services they might have obtained but did not in fact obtain. One also finds that when users have to bear the cost of information themselves they naturally become more critical.

For these reasons, it should never be too readily assumed that the aim of satisfying users' information needs has been achieved.

3.2.4 Suggested reading

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3.2.5 Evaluation exercise

To show the existence of different information patterns as between various contexts, it is suggested that real cases be presented to the students. One interesting method is to invite professionals working in different contexts into the classroom. They would briefly describe the typical features of their users, and students could then join in, asking questions and comparing the information supplied in class with the account provided by the professionals.

With regard to the key concepts, an objective test may also be employed to check Dervin's theories (see Annex II).

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3.3 MODULE 3: Marketing research

GENERAL OBJECTIVE:

To provide students with an introduction to conducting marketing research.

SPECIFIC OBJECTIVES:

On completion of this module, the student should be in a position to:

1. define marketing research;
2. describe the stages in the preparation of marketing research;
3. explain the principle methods of data collection and their specific characteristics;
4. explain the principle and main methods of sampling.

3.3.1 Marketing research

In the definition quoted in Module 1, Serraf explains that marketing involves three stages: research, strategy and action. The last two constitute what Justeau calls the 'operational phase' of marketing, i.e. the stage when decisions are made and the stage when action is taken. But these two stages must be preceded by a 'functional phase' involving the collection of the information that will be used to establish the strategies and plans of action(1). The first stage in this process, then, must be to collect certain information about the market, about customers, about the environment, etc. so as to make for a more effective exchange with the public. This first stage is called marketing research.

Some managers forget about marketing research or assume that they are already familiar with the needs of the market. Nothing could be more dangerous. As Coffman emphasizes, research is central to - not to say a vital prerequisite for - marketing: 'If you aren't doing - and using - research, you aren't doing marketing. It's as simple as that. Research is to marketing as the senses are to the human body: inseparable, inherent, and indispensable'(2).

Marketing research takes a number of forms. Twedt has established a typology on the basis of a survey carried out in 1978(3). The first category covers sales and market research, which virtually all firms surveyed say they carry out. This includes consumer research designed to identify consumer needs and define the market more accurately. The second category covers studies of products, particularly research on the creation and acceptance by consumers of new products. Next come economic analysis and strategic research, i.e. everything to do with prices and income forecasts. A fourth category covers advertising research: measurement of the effectiveness of campaigns, media research, etc. Lastly, Twedt's fifth category covers studies of the responsibility of the firm, in particular its impact and that of its products on the environment, together with studies of consumers' rights.

Thus marketing research goes beyond the traditional market study, which is much more restrictive and is limited to studies of customers. Kotler defines marketing research in the following way: 'Marketing research is the systematic design, collection, analysis, and reporting of data and findings relevant to a specific marketing situation or problem facing an organization'(4). And the following definition is given in a book concerned with marketing research: 'The process whereby the information necessary for decision-making in marketing is generated'(5).

3.3.2 The preparation of marketing research

The cost of marketing research is often advanced as an excuse for not doing any. However there are several ways of overcoming this problem, as Barry Smith points out(6). For example, resources may be pooled and costs shared by operating on a network basis: several public libraries have already adopted this approach. Units within large public or private organizations - such as the research centre or computer service of a university or of the company to which the information service is attached - can also make use of the internal resources often available without incurring additional expense. In some countries government agencies also operate subsidy schemes (e.g. job creation) which could take in marketing research projects.

Proper preparation is essential for assessing the cost of marketing research. Managers must first decide who is to carry out the study: will they use their own staff or hire a consultant? If they decide to allocate internal resources they will have to devote a considerable amount of time and energy to the project. Public organizations may call on the assistance of volunteers, at least for the data gathering operation.

If the managers decide to hire an outside consultant they must exercise caution. A marketing researcher who is not thoroughly familiar with information services could easily fail to address the problem: we have seen in the previous module that the definition of user information needs is a difficult and complex matter. Whatever the case, managers should realize that they must become involved in the project, particularly in the definition of the basic problems and of the aims and objectives of the study. They will also need a basic knowledge of methodology so that they can conduct discussions with the consultant and exercise a certain level of control over the project.

The stages in marketing research proper are the same as in the scientific approach. Firstly, there is the identification of the problem, that is to say, the reason why the study is being undertaken. This involves defining the major problems facing the information service - problems that it hopes to solve by adopting a marketing approach. The approach generally suggested is by means of questions. For example: why does library use stagnate at around 20 per cent of the population? Which segments of the market make no use of data banks? Why not? How can a specific segment be reached?

Marketing research may be carried out on either a continuous or an occasional basis. Large information services (with 100 or more employees) may be able to afford a research department which examines marketing problems on a continuous basis. Such a department could, for example, plan market studies every three years with additional studies to be conducted annually. This is, of course, an ideal situation. Smaller centres must find an alternative, which usually involves making do with occasional studies - for example, to test a new product under development or to take a decision about a proposed change in customer services.

The second stage, a review of the literature, involves an examination of the relevant available information from the standpoint of methodology and also in terms of the data collected, which is described as 'secondary'. The first thing to do is to look at similar studies carried out in the past on the same subject in order to see what type of methodology may be employed. Studies may, moreover, already have been carried out on the target population, and it would be extremely useful to consult their results in order to obtain an initial idea about the market in question, what has already been established and what remains to be done.

Figure 3.6: The stages in marketing research

1. Identification of the problem
2. Review of the literature
3. Formulation of objectives
4. Selection of methodology
5. Data collection
6. Data analysis and drafting of report

After this stage, managers will be in a position to formulate accurately the objectives of their study. These objectives will determine the variables to be measured. They may also be expressed as hypotheses, i.e. in the form of answers to questions which must be tested. For example: executives use the documentation centre more often than engineers or technicians. Or: opening the library two evenings per week would increase its use by 10 per cent. It is then clear precisely which questions must be asked.

The following stage involves defining the methodology: choosing a method of data collection and a sampling plan (see following pages).

Next comes the actual data gathering operation.

Lastly, the data must be analysed and the report drafted in a style which will enable the data collected to be used.

3.3.3 Types of research

The choice of methodology in marketing research generally depends on the advantages sought, having due regard for the nature of the problems posed and the physical context of the study. Certain methodologies do offer specific advantages: some are more economic while others may be quicker. The most appropriate will be chosen according to circumstances.

Perrien, Cheron and Zins identify three major types of marketing research: exploratory, causal and descriptive. These types of research correspond to a number of data-gathering methods(7).

Exploratory research is rarely conclusive. It generally steers the researcher in the direction of a more exhaustive study. However, in the context of information services, managers must often make do with this type of research because of a lack of resources.

This type of research is, in fact, associated with data-gathering methods which are cheap and relatively simple to apply: the use of secondary data and case-studies.

Secondary data may actually be of great value. It may take the form of information from within the organization, such as sales figures or rates for the use of a service. A worsening market situation may sometimes be redressed by carefully scrutinizing this information. External secondary data can be supplemented by internal information. This may be survey data produced by someone else about the organization and/or its environment or data from major

national statistical organizations(8). Such data may be used to define a market, to identify customers, to select a target public, etc.

The case-studies generally come down to informal meetings with current or potential customers. This is a non-quantitative method and statistical analysis is therefore not possible.

Although exploratory research often introduces an element of subjectivity it can, at least, pave the way for a more substantial study subsequently.

The purpose of causal research is to establish the cause-and-effect relationship between the variables affecting a marketing situation. Unlike the exploratory approach, it employs very sophisticated types of methodology including experimental methods. Andreasen has pointed out how this methodology could be used in the information field to measure the effectiveness of different advertising strategies for a new collection of video cassettes in a public library(9). In the example he quotes, the procedure involves identifying three themes for an advertising campaign (the pleasure to be gained from viewing video cassettes, the low cost of borrowing them, and the wide range of the collection). Three leaflets developing these themes are then prepared and sent to different target publics. The aim is to discover whether certain themes have a greater impact than others on a specific target public and, as each leaflet includes a reply coupon, one need only count the number of coupons returned by each group.

Little use has so far been made of causal research in the information field. It can, however, be employed in all types of services including archive services as Holmes shows in his study on the various methods for the storage of archives and the preferences of different types of users(10).

The sophisticated statistical methods of the causal approach provide a way not only of determining the current situation but also of forecasting those configurations that would improve the effectiveness of information services.

Descriptive research is the commonest type of research in information services, particularly for the identification of customer needs. The professional literature abounds with interesting cases.

As its name indicates, the purpose of this type of research is to describe a marketing situation. Darmon, Laroche and Pétrov state that there are two main methods of data gathering for this type of research: observational methods and methods involving communication with the subjects in the data-gathering process(11).

Observation is the most elementary method for gathering primary data. It takes the form, simply, of recording the presence of absence of specific forms of behaviour. For example, this method may be employed to establish the use made of a library catalogue, by recording manually or automatically the number of people who consult it over a given period. The technique is limited, however, inasmuch as the form of behaviour measured must be of short duration and occasional. Wilson and Streatfield have however shown that a form of highly structured observation may be very effective and produce interesting results as it provides a complete and frequently more accurate picture of a given situation(12). Of those methods that involve communication with subjects, the questionnaire is certainly one of the best information-gathering tools. It may take different forms: diaries to be completed by the subject, personal interviews, interviews by telephone or by correspondence.

The diary method is not yet very common in the information field. Davis mentions its advantages and disadvantages(13). It involves asking the users

of an information system to note down their information-seeking behaviour in a diary: use of catalogues, indexes, data banks, etc. Although this method is very economical, the co-operation of the subject is absolutely vital and that is not always easy to obtain.

The personal interview is more common. It quite simply involves meeting the customers (actual or potential) fact to face. This type of information-gathering is more widespread, although there are several difficulties associated with it(14). The market must be geographically limited, otherwise a large sample will be required and that would increase the cost of the market study. Moreover, the experts agree that interviewers must possess certain skills and have received special training in order to be effective and not bias the results.

Figure 3.7: The different types of marketing research

1. Exploratory research:
   - secondary data
   - case-studies
2. Causal research:
   (experimental)
3. Descriptive research:
   - observation (loosely or highly structured)
   - questionnaire:
     - diaries
     - personal inverviews
     - group interviews
     - telephone interviews
     - by correspondence

Nevertheless the interview also has several advantages. It is a more flexible method and makes for a survey in greater depth. It can be used with all types of clienteles, including children and illiterates. Moreover, the interview generally produces a better response rate than is achieved with other methods of information gathering(15).

Different types of interviews are used in marketing. They may be conducted on an individual or group basis. The individual interview may be relatively simple but can also be used to identify the deep motivation of customers. In the latter case it is usually loosely structured. Projective techniques may also be employed, that is methods in which various stimuli are presented to subjects so that their behaviour may be analysed on the basis of their reactions. A similar approach was used in Toronto to discover the preferences of users with regard to the layout and decoration of libraries before fixing the plans for the construction of a new public library branch.

Interviews may also be carried out with groups of eight or 12 people. This approach requires an experienced organizer but sometimes produces surprising results. The group then becomes 'the projected face of society'(16) and the interactions between individuals provide information no less relevant than the answers given by those taking part. Di Giambattista describes the use of this method for college libraries(17).

The telephone interview is an increasingly popular method for obtaining information, at least in the developed countries. It shares several of the advantages of the personal interview and of the printed questionnaire: a relatively high response rate and speed of execution as well as minimal operating costs. Only a limited number of questions are possible however, for the interview ceases to be efficient if it lasts more than 5-10 minutes. There are also serious sampling problems in some cases, for example when the interviewees have no telephone or their number is confidential.

Lastly, the gathering of information by correspondence is still the most commonly employed method for marketing research in the field of information(18). The main advantages of the method are as follows: it is cheap since large scattered samples may be used; it may be anonymous; it guarantees an identical stimulus for all respondents; it enables the maximum amount of information to be collected with a minimum of time and effort; and, lastly, the questionnaire is completed by the subject in person at the time which he or she considers most convenient.

On the other hand, this method also has several disadvantages: the respondents must be able to read, the choice of answers is generally limited except for open-ended questions (which are not advisable in this case as they create problems with regard to the classification of answers), and the response rate is often very low. The response rate may be boosted however by using certain techniques: a proper letter of introduction, professional presentation, facilities for the return of the questionnaire, principle of rewarding respondents, reminders, etc.

Each of these methods has its advantages and its special characteristics, and marketing researchers must select the method best suited to their context. For even greater effectiveness, it is worth combining these different methods: for example, a questionnaire sent by post plus in-depth interviews with some of those replying to the questionnaire. This will provide a clearer interpretation of the situation to the inevitable benefit of the resulting strategies.

3.3.4 Sampling

Sampling is a particularly useful technique in marketing research as it enables researchers to discover the configuration of the total market on the basis of a tiny fraction of the whole. They can thus save much time and effort while still obtaining a fairly accurate picture of the situation.

However, the sampling process must conform to certain clearly-defined rules if it is to be effective. Scientific sampling is based on the notion of chance: in order to be representative of a total population a sample must be selected as nearly as possible on a random basis. Otherwise the laws of probability which underpin the notion of chance and scientific sampling will not ensure that the sample is well and truly representative.

There are several types of sampling, the simplest of which, but also the least scientific, is undoubtedly accidental sampling. The researcher employing this method, which is certainly economical, need only take up position at any one spot and select the individuals who appear in order to carry out the research. Pure chance plays little part in this technique and

the information gathered must be treated with great caution. Nevertheless, it enables useful information to be collected cheaply. For example, a university library may collect a certain amount of information about students' appreciation of its services at the student cafeteria. The views expressed cannot, however, be considered as exhaustive. The same will apply to a public library whose managers collect opinions about their services in a shopping centre: the picture of the market that emerges will be incomplete and will doubtless reflect no more than a specific category of actual and potential users.

Greater accuracy may be introduced by combining this method with the so-called quota method which involves the establishment of quotas corresponding to known features of the population concerned. For example, if 70 per cent of the students in a university are known to be male, then the accidental sample could be limited to 70 men and 30 women. Larger numbers of more complex factors could, of course, be used in establishing these quotas. The sample thus obtained will be more representative of the population, but there will be no certainty of it being perfect.

Much use is made of 'purposive' samples in commercial marketing, particularly in order to test new products. For example, a town which is fairly representative of the entire market is selected and products are tested there. This method may be applied to the information field by selecting a group made up of what are considered to be, for example, typical users of data banks and treating them as a representative sample. Their behaviour may then be observed or they may be issued with questionnaires. In this case too, however, the representativeness of the sample cannot be guaranteed even although interesting results will certainly be obtained.

Figure 3.8: Principal forms of sampling

1. Accidental
2. By quota
3. Targeted
4. Random
5. Stratified

In order to be truly random and therefore scientifically representative, a sampling operation must ensure that all individuals in a population have an equal chance of being included in the sample. As we have seen, this is not a feature of the methods described above.

This condition is best met by using a complete list of the population targeted by the study. Drawing names from a hat is still the best way of ensuring that a genuinely random choice is made from among the subjects. If the population is too large for such an operation to be feasible, a perfectly representative sample may be guaranteed by using a list of random numbers in order to select individuals (19).

Even greater effectiveness may be achieved by employing more sophisticated techniques such as stratified sampling: this involves the preliminary subdivision of the population under study so as to ensure that perfect representativeness is maintained for each category. Thus, in a study

of the population served by several public libraries, the various communities would be divided before sampling into large, medium-sized and small. The subjects would then be selected at random within each subgroup rather than within the total population, thus ensuring overall representativeness and also representativeness at every level.

This method resembles quota sampling, which was mentioned above, but it is quite different in the sense that subjects are selected on a purely random basis whereas in quota sampling they are selected 'by accident'.

The size of samples is something which many people wonder about: it may vary greatly, depending on the level of accuracy required. This matter is dealt with in detail in many books to which the reader is referred.

It must, however, be emphasized that administrative considerations often take precedence in marketing and the size of the sample is determined by the budget that is available. The researcher will quite simply select the largest sample possible, in the knowledge that costs increase with the size of the sample but that results become correspondingly more reliable.

Some people believe that there is no need to make use of a sample if the population is small, say around 200 subjects. This is not true. Sampling makes respondents aware of their responsibilities, whereas a study of an entire population detracts from the importance of the entire operation: in the first case, respondents are more likely to co-operate as they are accorded a certain degree of importance, while in the second case they do not consider their contribution to be essential; 'as the others will take care of it'. Sampling, then, usually produces a better rate of response.

3.3.5 After the data has been collected

Data compilation will require a fair amount of time, depending upon the methods employed. Specific questions are generally best as they enable the compilation to be carried out rapidly. When the questions are open-ended, each line of the answers must be read, and possibly 'translated', which may also lead to distortion.

Once the questionnaires have been gone through, automatic methods of data processing may be employed. Highly satisfactory sets of software exist for this operation, such as the 'Statistical Package for the Social Sciences', which is available in versions compatible with several types of micro-computer(20). Cheaper and less powerful software, such as 'Statistix', which nevertheless provides simple, effective and rapid processing, is also available for smaller-scale operations(21).

As the information collected is intended for decision-making, the drafting of the research report is most important.

In general, the rule is to concentrate on essentials and avoid getting lost in detail. The most important thing is to mention whatever may affect decision-making. For example, what are the peak hours at the documentation centre? Which services or data banks are most used? What is the level of satisfaction? Which potential customers do not use the service?

A good report is generally drafted in an impersonal style and in an objective manner. The use of the first person should be avoided. Value judgements should also be avoided and statements should be supported wherever possible by appropriate quotations or references to other authors with an established reputation.

Precise recommendations may also be made on the basis of the observed facts: a recommendation to hire more staff, to change the lines along which the collection is developing, to improve communication with certain segments of the market, to adjust prices for data banks, etc.

Research in the information field too often has only a limited impact on decision-making, which casts doubt on its usefulness. The link between research and planning is not always obvious. Yet research has an important role to play in planning, and adopting the approach outlined above when drafting the report will increase the likelihood of the results being accepted. They will then have a greater chance of being applied, provided, of course, that the entire marketing research process has been carried out in accordance with standard procedures.

3.3.6 Suggested reading

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Busha, C., and Harter, S.P., Research methods in librarianship. Techniques and interpretation, New York, Academic Press, 1980. Chapter 3: Survey research in librarianship.

Perrien, J., et al. Recherche en marketing: méthodes et décisions, Chicoutimi, Gaétan Morin éditeur (diff. Paris: Editions Eska S.A.R.L.), 1983. Chapter 1: Le rôle et la réalité de la recherche en marketing. Chapter 2: La méthodologie de la recherche en marketing. Chapter 4: Le questionnaire. Chapter 7: Méthodes d'échantillonnage.

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3.3.7 Evaluation exercise

One interesting exercise which students might be asked to perform would be to draw up, preferably in writing, the objectives for a possible piece of marketing research. They could also be asked to devise various hypotheses.

In order to help students grasp the importance of well-designed questionnaires, they could be asked to improve a 'bad' one (Annex III). This exercise may be carried out individually and in writing or else by groups of 4-7 in the form of a discussion lasting 30-45 minutes. Kotler also suggests this approach in his book and provides an example of such a questionnaire (Marketing for nonprofit organizations, 1982, p. 163).

In order to demonstrate the importance of chance and of the number of subjects in the sampling process, an attempt might be made to calculate the average age of the students in the class (if the number is quite large) by using different types of samples corresponding to the models presented in class. The most accurate sample should be the one which is most random (drawing names out of a hat) and is based on the largest number of subjects.

Notes on Module 3

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6. Smith, B., 'Marketing strategies for libraries', Library Management, V.4, 1983, p. 27.

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14. Stone, S., Interviews, Sheffield, Centre for research on user studies, University of Sheffield, 1984.

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16. Justeau, op. cit., p. 47.

17. Di Giambattista, J.V., 'Consumer research for college libraries: doing the job in-house', College and Research Libraries, V.47, 1986, pp. 13-16.

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3.4 MODULE 4: The marketing mix - supply

GENERAL OBJECTIVE:

To teach students how to identify the components in the mix that constitute the supply.

SPECIFIC OBJECTIVES:

On completion of this module, the student should be in a position to:

1. understand the various implications of the 'product' mix for the marketing of information services;
2. understand the various implications of the 'distribution' mix for the marketing of information services;
3. understand the various implications of the 'staff' mix for the marketing of information services;
4. understand the various implications of the 'price' mix for the marketing of information services.

3.4.1 Analysis of the supply

After studying the market demand for their information services, managers must define what they can and should offer their customers. Marketing means adapting to the needs of the market and not foisting upon it a product thought to be useful to it. This stage provides an opportunity to analyse the various elements of the marketing mix related to the product and the conditions under which it is to be supplied: its price and distribution and the staff concerned.

As explained above, the marketing mix is the set of ingredients which make up the marketing strategy, the aim of which is to maximize the satisfaction of customer needs. It must not be forgotten, however, that all these elements are interdependent. A strategy which is based on an excellent product supplied at an unsatisfactory price is doomed to failure even if the other elements in the mix are properly calculated. The ingredients must produce a smooth mix, working together to create an effective strategy. Each element in the mix is itself composed of sub-elements which form a mix: there is, therefore, a 'product' mix, a 'distribution' mix, a 'communication' mix, etc.

The precise configuration of each of these elements and sub-elements will be worked out on the basis of the results of marketing research. The information obtained about customer needs, tastes, behaviour and preferences will provide the necessary basis for a proper product analysis and for taking the right strategic decisions.

3.4.2 The product

As Lovelock and Weinberg point out, the word 'product' is one of the key terms in the vocabulary of marketing. It refers to the overall output of an organization: goods, services and activities(1). Chirouze provides the following definition: 'From the marketing standpoint, a product is a set of material and intangible elements fulfilling a practical and a prestige function, which the consumer wants for the services it provides and its capacity to satisfy needs'(2).

The product concept is therefore very wide and inclusive. One common mistake in marketing which almost always leads to failure is to define the product too narrowly. This danger has been clearly described by Levitt who refers to it as 'marketing myopia'. He gives as an example the railways in North America which apparently declined because they had a very limited view of their product: 'rail transport' in relation to transport in general(3). The deciding factor in competition between products is today very often their added value, which has to do with the market's perception of the product, its packaging and the psychological values which it incorporates, etc.

Kotler distinguishes three levels in the concept of a product: the tangible, core and augmented levels(4).

The tangible product is the level which is perceived directly by the customer. The obvious examples in information services are books or physical documents.

The core product is the essential benefit obtained by the customer. Examples of this would be the information supplied by documentation centres or information brokers, the leisure activities provided by public libraries, or the knowledge and learning which may be obtained by consulting a university library or archive service.

The augmented product covers the advantages perceived by the customer who purchases a product, for example the quality and objectivity of the information provided by a reputable documentation service. The whole question of the brand image which an organization should develop for its various products is linked to this level. There may also be certain disadvantages associated with the use of a particular product and this becomes obvious when a product is compared with its rivals. Smith gives as an example the sometimes interminable journeys of public library users in search of documents: they must pinpoint the library, go there, find a parking place, find the title in the catalogue and then on the shelves possibly asking for assistance from the staff, show proof of their identity in order to join and borrow the documents, etc(5).

Figure 3.9: The different levels in the concept of a product

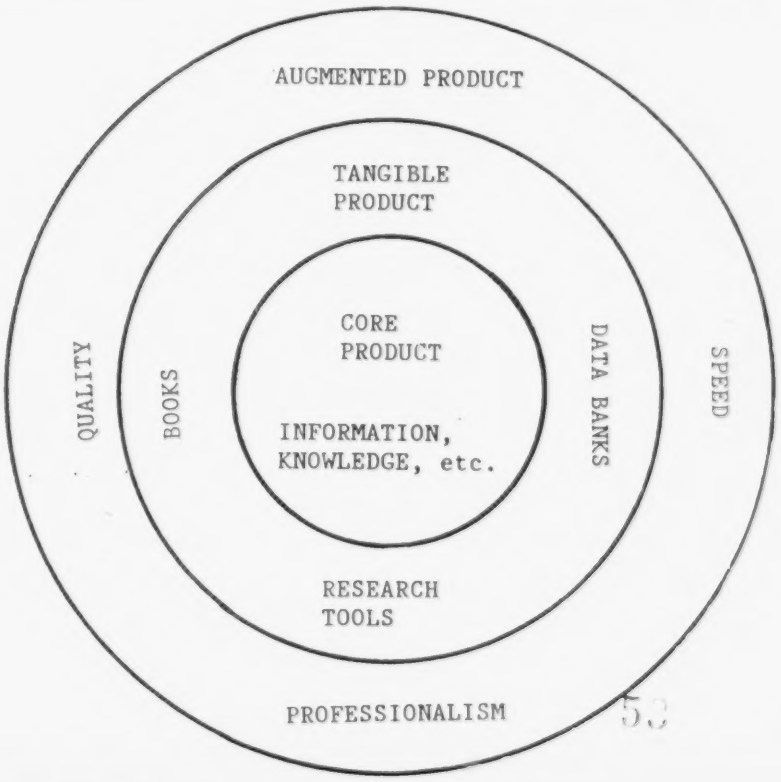


Figure 3.10: Lines and ranges of products in information services

RANGE OF PRODUCTS ⟶	DOCUMENTS	ASSISTANCE FOR USER	RESEARCH SERVICE
	monographs periodicals microdocuments maps/plans audio-visual	general guidance reference and information specialized reference	access to data banks prep. of retrospective bibliographies selective dissemination of information
	↑ PRODUCT LINE	↑ PRODUCT LINE	↑ PRODUCT LINE

As well as the various product levels managers must also take account of the lines and ranges of products which are to be supplied.

A line of products is the totality of products of a single type offered by an organization. Examples would be the various types of document available from an information service: monographs, periodicals, films, microfiches, etc.

The range of products comprises all the product lines offered by the organization, for example the various documents, customer services and research services. Figure 3.10 illustrates some possibilities for an information service.

Lastly, managers must realize that products are not immutable. Marketing experts refer to a product's life cycle. Products pass through various stages characterized by different levels of market acceptance. The first is the product introduction phase. At that point, the product is unknown to the public and a special effort must be made to advertise it, as happened with CD-ROM when it first appeared in 1985-1986.

The second stage in the product's life cycle is a growth phase during which the product achieves a wider distribution. An example which comes to mind is that of the home microcomputer during the period when sales increased rapidly. One feature of this stage is the development of competition: few organizations will be supplying the same product at this stage but as it gains in popularity others will wish to do so.

Figure 3.11: The life cycle of a product

The third stage is that of maturity. The level of sales stabilizes and competition leads to a price war which helps to lower the purchase price of the product. Paperbacks are a type of book product which reached this stage some time ago.

The period of maturity is eventually followed by a period of decline: new rival products appear, customer preferences alter and fashion changes. The black-and-white television set is an example of a product which is currently in decline in the West. Some people would say that the book as an information medium is another product which has entered its period of decline and will evetually be replaced by other (essentially audio-visual and computerized) media, although this remains to be seen.

There are, however, no rules for establishing the life of a product or the duration of each phase in its life cycle. Some products experience rapid growth while others take years to reach maturity. Some enjoy a period of maturity which lasts for decades, while others meet a tragic end shortly after reaching that stage. It is the outside environment which decides, and it is the task of managers to monitor the development of their products by conducting marketing research.

The concept of the product life cycle suggests that products die and must be replaced by others. When one of their products is discarded by the market, managers must therefore react by creating new products. Certain guidelines must also be observed in this process of product creation in order to meet the needs of customers.

The creation of a new product is usually said to involve eight stages(6). The first stage is a search for ideas, which involves the generation of as many ideas as possible both inside and outside the organization with the aim of turning them into products or services. A natural way for information specialists to collect ideas about what is going on elsewhere is to participate in professional conferences and read the professional literature.

Techniques such as brain-storming, involving group discussions, are also useful in helping to generate ideas. Documentation centres and libraries often employ user suggestion boxes, which can also yield interesting ideas for new products or services.

The second stage involves sifting the ideas collected and picking out the best of them. Each idea is then analysed from a marketing standpoint, preferably by several people using systematic methods such as assessment grids.

The next task is to define the concept of the product. The ideas selected during the previous stage are evaluated on the basis of different criteria of the success of the product: Who is it for? What are its advantages in comparison with its rivals? What will it actually look like? This analysis usually produces several concepts. Thompson describes this stage clearly in his article on the creation of a new product for a documentation centre which had adopted the idea of a new data bank to meet user needs more effectively(7). Definition of the concept meant deciding what form the data bank would take. There were several options with regard to content and form: the structure, method of indexing, interrogation and access facilities, mode of distribution, etc. These various elements are determined at the concept definition stage.

Figure 3.12: Stages in the creation of a product

1. Search for ideas
2. Sifting of ideas
3. Concept definition
4. Economic and commercial analysis
5. Strategy
6. Product development
7. Product tests
8. Product launch

The next stage involves the economic and commercial analysis of the concept that has been adopted. An effort must be made to discover whether the product is viable - whether it will achieve a sufficient level of profitability to justify the cost of developing, publicizing and producing it.

It is then necessary to define the marketing strategy for the new product, i.e. to decide how it will combine with the other elements in the mix. What is to be its selling price? How will it be distributed? How will it be advertised? What staff will be necessary?

Once the strategy has been defined, the product itself, and all that accompanies it, must be developed. If the product is a technical one - such as a data bank - it must first be physically produced. The ground must then be prepared for the use of the product: this includes the hiring and/or training of staff and the purchase of the necessary equipment.

The products are then tested. It is essential to discover exactly how customers will react to the new product. Various techniques are available(8).

The last stage is the product launch. The launch must be carefully prepared as a poorly launched product may easily fail.

The product is thus an important component of the marketing strategy as it is central to the exchange between the organization and the market and is, in a sense, the 'primary level' of response to customers' needs.

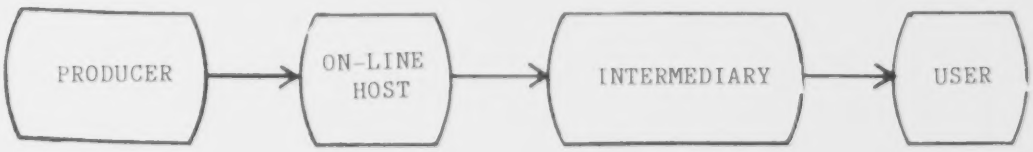
3.4.3 Distribution

Lovelock and Weinberg define distribution as the various means available for providing customers with access to 'the right product at the right time and the right place'(9). Product distribution structures must therefore be devised to match the habits and behaviour of the groups of target customers.

Direct access to the product is particularly important. In this connection, the example of public libraries is especially interesting as they have so long resisted the operation of the law of least effort on the part of their users by adopting effective distribution strategies based on branch libraries and bookmobiles. The population served by a public library may indeed pose distribution problems when it is scattered over too large an area. It has also been proved that the use of library services is affected by the distance of the customers from the library(10).

Data banks are another interesting example of the distribution of information products. Unlike libraries attached to institutions which distribute their services directly to their customers, data banks distribute their information through a system resembling distribution networks for physical goods. Data bank producers generally use an on-line host, usually a commercial organization which acts as a distributor for several data banks (e.g.: Dialog). With few exceptions on-line hosts have not so far managed to establish direct contacts with their customers(11). They have been obliged to go through intermediaries who are either information brokers or, in most cases, libraries. Figure 3.13 illustrates this data-bank distribution process.

Figure 3.13: Data-bank distribution process



On-line hosts would certainly like to contact their customers directly as that would provide them with a broader commercial base. But their ambitions have so far been curtailed by the complexity and diversity of the query languages and the purchase cost of the necessary hardware. In future, on-line hosts may be 'technically' able to distribute their product directly without intermediaries with the advent of expert systems and the lowering of equipment costs. However, they will still have to weigh the pros and cons of such a strategy. For the mode of distribution has a direct impact on marketing communication strategies. Hitherto on-line hosts have mainly established contact with a small group of purchasers: the middlemen. If they adopt a strategy of direct distribution to the consumer they will have to cope with much higher advertising costs and check by means of appropriate market tests whether such efforts would be really worth while.

Distribution is also a matter of access over time. The service must be available when the customer needs it. University libraries, for example, must adopt opening hours that correspond to students' work habits: opening in the evenings, if necessary, and extending their hours during examination periods. The same applies to local libraries: it would be unreasonable to limit the opening hours of public libraries to the hours of 9 to 5 from Monday to Friday as that is the time when a large percentage of their customers are working.

Lovelock and Weinberg also state that the distribution of a product may be affected by the environment(12). Thus, a documentation centre concealed in a dusty, cluttered second basement would find it very difficult to distribute its services even if it was very effective. The user often assesses the quality of the service on the basis of the surroundings and tends not to revisit unwelcoming premises.

Technical and/or technological resources may be employed for the purpose of distribution. The increasing use of the telephone in information services has made distribution more efficient as the customer does not have to move around. Some American public libraries have even set up an automatic 24-hour answering service which maximizes distribution at little cost.

Some information services also employ rapid methods of document delivery: Freeman and O'Connel explain how their strategy for the distribution of biomedical information was greatly improved when they abandoned traditional postal services for express courier services(13).

The development of networks and new technologies is also bringing about considerable changes in the distribution parameters of information products: facsimile, electronic mail and even the use of satellites(14) are now offering managers promising new methods for the distribution of information.

3.4.4 Staff

As we have already said in Module 1, the treatment of staff as a separate component in the marketing mix is relatively recent. None the less, most marketing experts have long recognized the importance of staff in marketing strategy. They were previously seen as part of another 'P', the communication mix(15). The staff referred to were, in fact, only those in direct contact with the customers, that is to say, the sales force. But it is possible to take the view that all staff are involved in the marketing process, particularly in the marketing of services where, as Leonard Berry points out, it is performance that is being sold rather than a physical and impersonal product(16). In the information field, for example, performance is the product of the entire information chain and not something supplied only by the staff who come in contact with the customers. Thus, indexing and cataloguing must be carried out professionally and reliably if the system is to provide an effective research service.

Flipo adds that the need to take all staff into account reflects the fact that production and sales are not separate in the service sector as they are in manufacturing. They occur simultaneously. What is more, customers play a part in 'production' as they interact with staff when they are served(17). Staff are therefore a very important factor in the formulation of marketing strategies.

The staff who come into contact with customers naturally still have a key role to play in making them welcome. Hobson, Moran and Stevens show how the front desk staff in libraries can influence the way customers view an organization. They point out that the staff on the loans desk are often the users' only contact with the library: 'For many users, these library staff

members are the personification of the library'(18). They therefore provided front desk staff in one university library with a form of training aimed at improving their relationship with the customers. This course in interpersonal communication was aimed at improving verbal behaviour (polite, courteous speech) and non-verbal behaviour (smiles and attention for the customer). The subsequent evaluation demonstrated that the experiment had been extremely profitable.

Other researchers have studied the relationship between specialist staff and users seeking information(19). Training - particularly basic training - seems to have an important role to play in this context. The situation in the information field often calls for two types of training: training in documentation to ensure thorough familiarity with research tools, and training in the particular discipline of the user so as to have a better understanding of his or her needs.

Managers must therefore ensure the perfect functioning of the organization in all matters relating to staff. That means appropriate recruitment and staffing levels. In this connection Berry makes the point that staff also represent a market to be conquered by the organization concerned(20). People now speak of 'internal marketing'(21). Competent staff must be attracted and retained in the same way as customers. They must also be sufficiently numerous to satisfy user needs.

The structure of the organization must also be flexible enough to provide a personalized service to its users. For example, criticism has often been expressed in library science concerning the traditional dichotomy between public and technical services inasmuch as it makes a single department responsible for customer service(22).

3.4.5 Price

The various questions concerning the price and the economics of information have generated a fair number of publications in recent years, whether in relation to more traditional information services or to the new information industry. Information operations in the public sector have been obliged to rationalize their activities in response to strong social pressure. Some institutions have even experienced draconian cuts which have, in some cases, forced tham to close(23). The information industry already represents an economic market of more than 4 billion dollars in the United States and nearly one billion dollars in Europe(24). The concept of price cannot be ignored in the marketing of information. Indeed, this element of the mix brings us directly back to the process of exchange which is central to the marketing approach: how much is the public willing to give in exchange for what we have to offer?

The concept of price as an element of the marketing mix covers two different types of price: the monetary price, which concerns the payment of a certain sum by the customer, and the social price(25). The social price corresponds to the additional effort which the customer must make in order to obtain access to a product. For example, the time spent waiting for a product may be calculated as an additional cost by the consumer. The purchase of a product may also require a certain effort on the part of the customer, who may have to travel in person to a particular location. The use of a product may also involve changes in a customer's attitudes and habits, which could produce a psychological resistance to the purchase of the product (as is sometimes the case, for example, with data banks).

Managers must therefore take account of this type of price in formulating their marketing strategies, for it may limit the use made of the services or products supplied.

They must also give careful consideration to their monetary pricing policy. Even in the public sector, charging for certain services is increasingly common(26). This trend, though, is sometimes challenged by those who consider that information is public property(27). Without entering this debate, we may say that some products supplied by public bodies will remain free whereas charges will have to be imposed for other, mainly new products.

There are three factors which must be taken into account in the calculation of monetary prices: the size of the demand, analysis of the costs and the impact of the competition.

There must not only be a demand for each product but it must also be supplied at a suitable price. At this stage managers must assess the share of the market that is likely to purchase the product and particularly the price it will pay. Research on the target customers must therefore be carried out to establish their paying capacity. If the price is too low the product might not be economically viable, while if it is too high it could discourage potential purchasers. In general, the price should strike a balance in accord with consumer expectations. This type of assessment is very tricky and, hence, important in information services to the extent that it remains difficult to put a price on information.

The real value of the product can be ascertained by means of a cost analysis. This is a complex stage in the marketing of services since it means fixing a price for all the operations involved. The direct costs (identifiable for each service or activity as such) and the indirect or hidden costs must all be taken into account. The latter category includes administration, maintenance, heating and other costs, which must be apportioned over the sales as a whole. Some people also speak of fixed costs and variable costs. Fixed costs are those that must still be computed when a service is not provided - rent being an example. Variable costs depend on the quantity of services or products sold, for example, telecommunication costs for data banks.

Lastly, it is important when fixing prices to identify the competition as customers usually make a comparision before deciding to buy. Prices must therefore be competitive.

Once these factors have been taken into account managers may proceed to set the actual prices, which may be reduced, for example, for customers in off-peak periods. An appeal may also be made to customer psychology - for example, by pricing a service at US $4.95 instead of US $5.00. Finally, methods of payment should be made as flexible as possible so as not to inhibit sales, e.g. by offering customers credit facilities.

3.4.6 Suggested reading

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Lovelock, C.H., and Weinberg, C.B., Marketing for public and non-profit managers, New York, Wiley, 1984. Part 4: The marketing mix.

Smith, B., 'Marketing strategies for libraries', Library Management. V.4, 1983. 'The product', pp. 29-38; 'Distribution', pp. 39-42.

3.4.7 Evaluation exercise

In order to help students acquire a better understadning of the various constituent elements of supply, they may be asked to discuss the following question in groups and then to share their conclusions with the entire class:

1. How is the product of a public library (or any other information service) geared to a rural context?

2. At what point are the following information products situated in the life cycle of the product?

   Encyclopedias
   Paperbacks
   Punched cards
   Software library
   CD ROM
   The selective dissemination of information
   Thesauri
   Data banks
   Video cassettes
   Dictionaries
   Card catalogues

   (Other products may be added)

3. What new products could be developed by an information service known to the participants?

4. What is the role of information brokers in the process of information distribution?

5. What should be the standard profile for front desk staff in information services?

6. What scale of charges would encourage the use of data banks in a large university library?

These questions may also be used in examinations or as individual assignments for the students.

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25. Lovelock and Weinberg, op. cit., p. 349.

26. See on this subject the special issue of Drexel Library Quarterly, V.19, No. 4, 1983.

27. Beard, J.C., 'Service non compris. Le problème du paiement dans les bibliothèques publiques', Bulletin des bibliothèques de France, V.31, 1986, pp. 514-519.

3.5 MODULE 5: The marketing mix - communication strategies

GENERAL OBJECTIVE:

To introduce students to marketing communication in the context of information services.

SPECIFIC OBJECTIVES:

At the end of this module, the student should be in a position to:

1. understand the nature of marketing communication;
2. know how advertising is planned;
3. understand the importance of public relations as a tool of marketing communication;
4. understand the importance of promotional activities as a tool of marketing communication.

3.5.1 What is marketing communication?

Once an organization has identified the needs of the market and what it can supply, it might be thought that success would follow automatically. But the market must be informed of the fact that the productor service is available. That is where marketing communication comes in.

Marketing communication is a series of techniques, often referred to as the communication mix, which make it possible 'to maintain systematic contact with market'(1) and thus to inform it about the products and services available. As Lovelock and Weinberg(2) point out, there is a certain amount of confusion regarding the ingredients in the communication mix: some writers restrict marketing communication to advertising plus the sales force (which we have included in the staff mix). As the above definition suggests, however, managers have a much wider range of techniques for reaching their various sets of customers.

But despite these occasional differences of opinion, there exists a degree of consensus that enables us to identify the components of the communication mix as advertising, public relations and promotional activities.

There is no problem in relation to advertising, which is undoubtedly the most visible component of marketing communication. It may be defined as the entire range of techniques for direct communication with the market.

The term public relations covers the entire range of techniques for indirect communication with the market, as we shall see below. Public relations is particularly important for non-profit organizations as it enables them to acquire a sort of free advertising.

The third component of marketing communication that we shall consider is what marketing specialists refer to as promotional activities. Darmon defines them as communication activities that do not fall into either of the other two categories(3). They are 'special activities organized in support of the advertising effort and the sales force'(4). In the business world this means competitions, free gifts, free samples, etc. In the information field these

techniques can be applied without modification or they can be adapted to the context of non-profit organizations: for example, the organization of events in libraries may be considered as a type of promotional activity as it encourages library use.

The basic principle in marketing communication is the same as in any communication process: it involves a sender, a message and a receiver.

Figure 3.14: Diagram of marketing communication

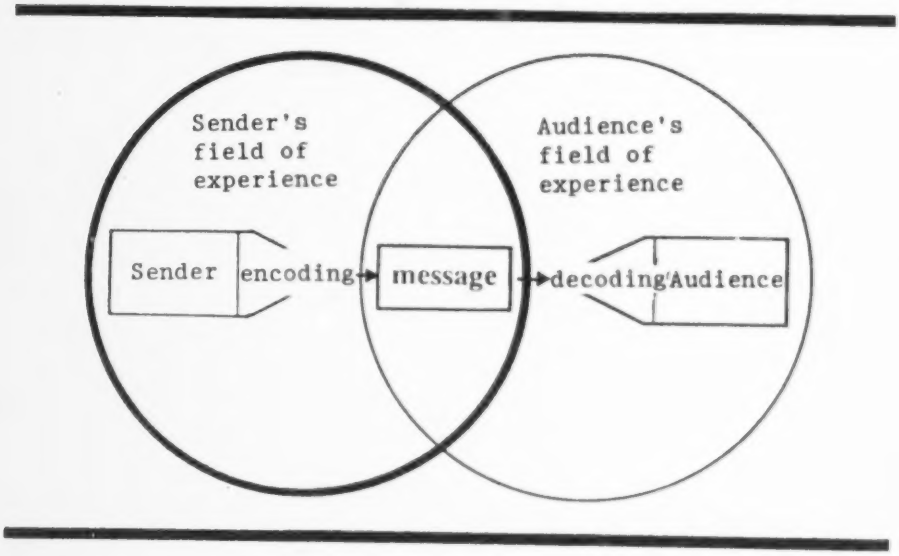


Figure 3.14 shows clearly how this process works. It also shows how important it is for the fields of experience of the sender and the receiver to overlap if the message is to reach its target.

This shared field of experience is essential in marketing communication. It means that an organization which is trying to communicate with its market must be on the same level or wavelength as the market if it wishes to be understood. In the field of information this means that it must set professional jargon aside and use words which everyone understands: for example, 'journal' or 'magazine' rather than 'periodical'.

It also means that it is essential to understand customers' motives and habits in order to communicate properly with them. For example, a knowledge of the tastes and lifestyle of young people is essential for good relations with them. Market studies provide much useful information in this connection.

3.5.2 The planning of advertising

As we see in our everyday lives, advertising is an extremely powerful tool. But it requires careful planning in order to achieve its objectives. Broadly speaking there are four stages in the planning of any effective piece of advertising:

1. the setting of the objectives;
2. the determination of the available budget;
3. the creation of the message as such;
4. and the selection of the medium or media.

The manager must first have a very clear idea of why he wishes to make use of advertising: he must set the objectives. The first task is to identify the principal customer for the product or service to be advertised. This will usually have been done at a previous stage in the context of the marketing plan (see Module 6). The basic rule which must be remembered is that it is impossible to satisfy everyone with the same product, hence the need for different messages addressed to each segment.

The next stage is to decide on the type of response which it is hoped to elicit from the public. This involves studying the purchase behaviour of customers. The phenomenon is a relatively complex one but the process may be said to involve just three stages: the cognitive stage, the affective stage and the conative stage. People generally pass through the first two stages before acting: i.e. they must first of all be informed of the product's existence (cognitive stage), then be predisposed to buy the product or be drawn to it (affective stage). Experts generally agree that one can not simultaneously set one's sights on all three objectives: publicizing a product, making consumers like it and getting them to buy it. It is essential to know which stage the potential purchaser has reached and then get him to move on to the following stage.

According to Chirouze, advertising objectives must have a quantifiable component so that some kind of check can subsequently be carried out on the achievement or non-achievement of the objectives(5). In setting his objective, the sensible manager will not forget to include two components: the proportion of the market to be reached and the time allowed for the purpose.

An advertising objective therefore has three components: the identification of the target, the required stimulus (to publicise a product or get consumers to like or buy it) and an exercise in quantification.

For example, the purpose of a piece of advertising might be to increase non-users' knowledge about a library by 50 per cent. Example one in Annex IV could have been designed for that purpose: it concerns a public library that persuaded a supermarket to distribute paper bags on which the library's slogan 'so much so close' was printed free of charge. These bags, which were distributed in large numbers, made many non-users aware of the library's existence.

Example two in Annex IV could also illustrate this type of objective. It involves a leaflet designed by a Québécois on-line host organization and appears to be addressed to managers. Its aim could be to familiarize at least 30 per cent of the managers in a specific region with the services of the firm concerned.

Examples seven and eight have an affective purpose and are intended for quite specific groups of customers. The first is aimed at young people who like cartoons and science-fiction characters. It was designed by the American Library Association, which obtained free of charge the right to use the character concerned in order to promote the use of documentary sources by young people. The colour drawing was reproduced as a poster and a bookmark.

The other example(8) is a poetic evaluation of the benefits of reading on the cover of a small leaflet prepared by an American public library for its users.

Examples 13 and 14 are clearly more concerned with inducing people to act. The first is intended for young children and issues a direct invitation to them to come to the library. It forms the cover page of a small colour leaflet containing a cartoon story about children who discover a friendly and entertaining public library.

The other example(14) - directed at those interested in scientific and technical information - is an announcement that appeared in various journals and which includes a reply coupon inviting people to respond.

Once the objectives have been fixed the next task is to determine the budget to be allocated to them. Various methods are available, the simplest of which are based on managers' 'instinct'. In the information field the basis is generally the amount of money available. Other more sophisticated methods are based on the relationship between sales forecasts and the impact of the advertising(6).

The next stage is the creation of the advertising message as such. This is the 'creative' stage in advertising, which is itself divided into three phases. It is necessary firstly to select the concept behind the message, then the content and, lastly, the format.

Selecting the concept means finding the approach through which people can most easily be reached. The concept adopted is generally the one that is closest in cultural terms to the target public. The possible options include, for example, serious or humourous tone, the use or non-use of testimonials and demonstrations (or evidence), an emotive or detached approach, realism or fantasy, etc.

This is a tricky stage. The selection of the wrong concept is something that may occur when people try to be too original and can prove disastrous if it shocks a section of the target public.

An interesting example that clearly illustrates this idea is provided in Annex IV at 20(a). A large university library that wished to campaign against vandalism decided to tackle the subject directly and with a dash of humour. The campaign was much more effective than a 'repressive' approach would have been as that would have further antagonized the customers and produced the opposite of the desired effect.

A concept that appears to be much in use in the field of information, as may be seen from certain examples in Annex IV (No. 18, in particular), is advertising by means of evidence or testimonials.

Once the concept has been selected the next step is to decide on the actual content of the message. The words to be used must be carefully chosen for both printed and audio-visual forms of advertising. According to Tillman and Kirkpatrick an effort should be made to answer two basic questions which will be asked by the target public:

What can you and your product offer me?

What advantages can I personally derive from this purchase?(7).

Example 3 in Annex IV answers these two questions rather well through both the text and the image.

The next task is to determine the format of the advertising message. If it is a printed advertisement it will be necessary to decide on the graphics, typography, illustrations, colour etc. In the case of an audio-visual message it will be necessary to decide on the pace, the décor, the actors, etc. All of these factors taken together can assist or impede the communication of the message. Examples 6 and 19 are quite successful in this respect.

As Chauze indicates there is no real theory describing the creation of effective messages but certain semiological approaches can help to identify some basic principles(8).

During the creative stage experts can sometimes be of assistance to the librarians, documentalists and archivists responsible for the project. Thus a graphic artist may be brought in on printed advertisements and an actor or technical director employed for sound or visual recordings.

The fourth and last stage in the planning of an advertising campaign involves the selection of the medium or media most appropriate for the message, taking account of both the target public and the resources of the service concerned.

Managers have several options. The cheapest way of advertising a product is to do it in person, visiting possible users: thus a documentalist may visit the various services in the institution where he works in order to publicize the services offered by his documentation centre.

Another relatively economic approach that is widely used involves the printing of leaflets or booklets. Several examples of this type of advertising are provided in Annex IV (2, 4, 8, 9 and 13). Distribution can take place in various ways depending on the target public and the context (on-the-spot distribution, postal delivery, door-to-door, etc.) However, large-scale distribution is much more expensive. The greatest disadvantage of leaflets and booklets is undoubtedly the fact that they sometimes encounter a certain level of public saturation. Graphics should therefore be eye-catching in order for this type of advertising to be effective.

Badges, bookmarks and other similar activities (example 20 in the annex) are also quite cheap and usually produced good results. However, these media are fairly unsophisticated and are not compatible with aiming at a wide range of advertising objectives and target publics(9). Posters, however, which are akin to these media, can reach specific target publics more easily as it is possible to select the points at which they are displayed. This appears to be a very popular medium, particularly in North America (examples 10 and 12).

Advertising in newspapers and journals is often expensive but some information services have managed to negotiate cheap rates or even obtain free space because of their status as non-profit organizations. The advertisements must be quite large, however, if they are not to go unnoticed: a small advertisement will not necessarily be seen by the target public, these media being addressed to all kinds of publics. Specialist journals can target more effectively but the period between the submission of an item and its publication may be as much as eight to ten weeks, which means that this is a less flexible medium from the point of view of advertising planning.

Radio and television are media to which it is difficult to achieve access (high production costs, particularly in the case of television) but they can reach a very wide public. Organizations operating in the field of mass information have already had recourse to these media, making use once again of their non-profit status. In North America several public libraries advertise on local radio and television, using advertisements designed and produced at national level by professional associations (American Library Association, Corporation des bibliothécaires professionales du Québec). The difficulty with these media often has to do with the limited amount of time available (usually 30 seconds) for the transmission of the message.

Once the medium has been selected there is also a choice of carriers to be made and a timetable to be established. Each medium has a certain number of carriers (the individual newspapers and journals, the various television and radio stations, etc.). Managers must decide which carriers will enable them to reach their target public most effectively. Lastly, it is necessary to decide, according to the results envisaged and the media selected, the frequency of the messages and the times at which they will be transmitted.

3.5.3 Public relations

As we have already pointed out at the beginning of this module, public relations are concerned with indirect communications between an organization and its various publics, unlike advertising which adopts a direct approach. This means that public relations is a continuous process and not a sporadic activity like advertising. Lovelock and Weinberg also state that the difference between advertising and public relations as ingredients in the communication mix is the level of control which managers exert over the content of the messages transmitted by these two channels: the advertising message is determined directly by the organization, whereas in the case of public relations the manager 'prepares the ground' for the communication (organizing events, press communiqués, etc.) but the final content of the message is beyond his control(10).

The aim of public relations is to be understood by the market and not to manipulate it as some people might think. The basic principle is very simple: it is easier to persuade the public to use the services of an organization that creates a favourable impression.

Organizations will therefore polish their image constantly, in the knowledge that the public is not indifferent to the outward presentation of any service. The word public must be understood in a very broad sense in this context. It includes not only the users or the immediate public but also the press and media as well as administrative and political authorities. In the case of non-profit organizations, potential patrons and donors are an important public relations target.

Good relations with users, then, are clearly of the utmost importance in retaining custom. Staff should therefore be made aware of this point, as we have seen in the previous module.

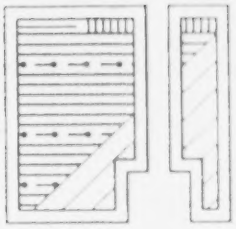
In its communication with users and the outside environment the organization must ensure that the image which it projects is always one of professionalism and efficiency. Thus, several libraries have designed their own logotype for use on their notepaper. This is a way of projecting a brand image of the organization to the outside world, as shown in figure 3.15.

Good relations with the press are also very important for managers wishing to ensure the 'visibility' of their organization. Making contact with journalists is often easier than one thinks. Such contacts must also be maintained by holding briefings at varying intervals.

An important event in the life of an information service, such as the acquisition of a major collection or the announcement of the construction of a new building, provides an opportunity for a press conference. However, this requires a great deal of organization and the event must be important enough to attract journalists.

Press releases should be used to announce less important events such as those organized in public libraries. They should be drafted in a clear plain style. A good communiqué has a heading indicating clearly that it is, in fact, a communiqué and stating its origin; the subject should be clearly identified at the outset as briefly as possible; the first paragraph should keep to essentials and the telephone number and name of the person to contact for further information should be provided.

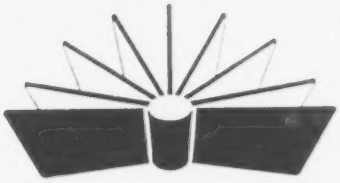
Figure 3.15: Examples of notepaper headings with logotypes



Bibliotheque Municipale de Villeurbanne

PLAINS AND PEAKS REGIONAL LIBRARY SYSTEM

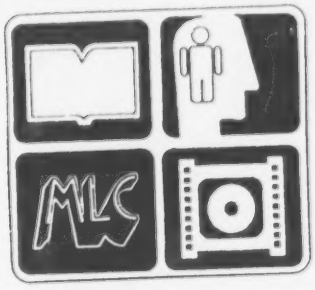
BROADMARKET SQUARE, SUITE D–2D, 1755 SOUTH 8th STREET
COLORADO SPRINGS, COLORADO 80906 (303) 473-3417, 1-800-332-7181 (TOLL FREE)



CENTRE DE DOCUMENTATION

Commerce extérieur
Québec

770, rue Sherbrooke ouest
Place Mercantile, 7e etage
Montreal, (Québec) H3A 1G1
(514) 873-5072



MISSISSIPPI
LIBRARY
COMMISSION

P.O. BOX 3280 / JACKSON, MISSISSIPPI 39207

South Central Library System

201 West Mifflin Street Madison, Wisconsin 53703

In the public domain, great care is also necessary in handling relations with the administrative and political authorities on whom the information service may often depend for its very existence. These authorities should always have the best possible image of the service. As we have already said, an information organization is a system which, far from operating independently, is subject to major influences in its environment.

Those concerned should not hesitate to communicate with decision-makers and to meet them as often as possible to let them know about developments in the institutions or improvements in its services. Small receptions may be organized in connection with specific events such as the launching of a publication, however modest, making sure to invite all the administrative and political authorities.

The same degree of attention should also be paid to relations with the managers of other departments on which the service depends. Good communications between managers in the same institution are always beneficial, particularly when the time comes to apportion a joint budget.

Managers in non-profit information services can raise outside funds to supplement regular funding sources. Fund-raising campaigns are an increasingly common form of public relations. In the past, information services often operated with low budgets or inadequate funds and the economic crisis struck them head on so that their managers are now obliged to seek voluntary contributions. This is true in both the developing and the developed countries.

Most writers on the marketing of non-profit organizations devote at least a chapter to this type of public relations and give many examples(11). Several public organizations now organize fund-raising activities each year. Public libraries have set up lotteries. Archive centres have organized meals at $100 a head, with the profits going to process a new collection. School libraries have organized reaching marathons whereby the young participants are sponsored and the profits go to the institution. University libraries have sold off books withdrawn from their collections. The imagination should be given a free rein in this area.

Some people even put a great deal of effort into persuading influential individuals in their company to make bequests.

Others get large companies to provide finance for specific activities, such as the acquisition of manuscript collections, the printing of the library emblem on sweaters or the purchase of computer equipment. Some companies and even individuals are quite willing to make donations to non-profit organizations - providing, of course, that the recipients show their gratitude by publicizing the origin of such donations. One should not be diffident about making proposals to individuals likely to respond favourably to such approaches.

Volunteers constitute another resource which is available to non-profit organizations. It may often prove very useful to recruit them for non-specialized tasks. They can also be asked to sit on advisory boards of management, in which case it is a good idea to select influential members of the community who can convince their fellows to make donations to the service concerned.

Information services may also seek donations in kind. Some public libraries have been left buildings or premises - often branch offices closed down by business organizations. Research centres have been given computer equipment for their documentation centres, and works of art have been presented to university libraries.

Public organizations will probably draw increasingly on external resources in the future and these techniques should also be adopted by the managers of information services.

3.5.4 Promotional activities

Promotional activities may also assume several forms. Pierre Levasseur defines them as follows: 'The purpose of promotional activities, which provide backing for the advertising campaign and the work of the sales force, is to stimulate the sales of goods or services by various means other than advertising or direct sales but drawing on both'(12).

Chirouze divides promotional activities directed at customers into three categories: price promotions, games promotions and goods promotions(13).

Price promotions are simply a matter of offering customers lower prices for a fixed period or on specified conditions. Thus a data-base services company or information broker may launch a promotion involving price reductions for a limited period to those wishing to interrogate certain data banks. This type of operation generally stimulates future use of the product and the lost income is recovered by the subsequent growth in the volume of sales.

Games promotions encourage the use of specific services by means of competitions or lotteries, for example. This approach has been used quite often in public libraries: prizes for the 100,000th customer, prize lotteries for members, assorted competitions, etc.

The types of goods promotion highlighted by Chirouze are the distribution of samples and the inclusion of free gifts with every purchase. These techniques have been employed less frequently in the information field although they appear to have a considerable potential, particularly in relation to data banks.

In the information field promotional activities can also take the form of organized events, which are particularly common in public and school libraries, or of documentation training for users. Like other promotional activities they encourage the use of services by means other than advertising. Moreover, this type of activity enables information services strongly to underline their distributive function, anticipating the customers' wishes in keeping with the idea of marketing.

Techniques for the organization of events in libraries are now quite well known. Their forms vary enormously. Lectures, particularly lectures on books and reading, have always been very popular. Workshops are a sort of practical counterpart, during which those taking part are introduced to such activities as pottery or drawing. Exhibitions are also very common. Some libraries organize film and video shows. Children's storytime and puppet shows are very common activities in public libraries throughout the world.

In some cases, libraries now offer continuing training to adults on such varied subjects as 'investing in the stock exchange' or 'getting over your divorce'. Lecturers, who are sometimes unpaid, give courses on the collections in the library.

Many institutions are now beginning to provide information training for users. Documentation centres and university libraries appear to have already adopted this method of promotion, which has proved to be a powerful means of reaching the market. Customers are too often unaware of the treasures stored

in libraries, documentation centres and archives and the amount of valuable time which may be saved by consulting an information specialist. User training thus highlights the facilities available to the public. In some educational institutions it is actually a compulsory subject for the students.

As with the organization of events, the holding of this type of activity boosts the use of services and increases the visibility of the organization and its staff.

Managers thus have a wide range of marketing communication tools available for use. They must therefore combine these various techniques in the most effective manner possible, a blend which is often referred to as the communication strategy.

3.5.5 Suggested reading

Lovelock, C.H., and Weinberg, C.B., Marketing for public and non-profit managers, New York, Wiley, 1984. Chapter 14: The nature and methods of marketing communication, Chapter 15: Communication strategies, Chapter 17: Attracting resources: funds, volunteers, and gifts-in-kind.

Kotler, P., Marketing for non-profit organizations, Englewood Cliffs (N.J.), Prentice-Hall, 2nd ed., 1982. Chapter 16: Advertising and sales promotion decisions, Chapter 17: Public relations decisions, Chapter 18: Recruitment marketing: attracting people, Chapter 19: Donor marketing: attracting funds.

Adams, M., and Morris, J.M., Teaching library skills for academic credit, Phoenix (Ar.), Oryx Press, 1985.

Kohn, R., and Tepper, R., You can do it. A PR skills manual for librarians, Metuchen (N.J.), Scarecrow Press, 1981.

Leeburger, B.A., Marketing the Library, White Plains (N.Y.), Knowledge Industry Publications, 1982.

Rummel, K.K., and Perica, E., (ed.), Persuasive public relations for libraries, Chicago, American Library Association, 1983.

Tod, M., 'The law of slow learning: marketing at the Dallas public library', Public Library Quarterly, V.4, 1983, No. 2, pp.29-38.

ALA graphics catalog, Chicago, American Library Association, annual.

Un livre pour tous (video 3 min.), Montreal, Corporation des bibliothécaires professionnels du Québec, 1983.

Take time to read (video 30 sec.), Chicago, American Library Association, 1987.

3.5.6 Evaluation exercise

In order to apply the lessons of Module 5, groups of 4 to 5 students may be asked to design marketing communication tools for existing information services: posters, logotypes, advertising scenarios, releases, etc. The students should be allowed several weeks to complete this task (if possible) and should then return to the classroom to present and discuss their efforts.

Discussions may also be organized on the content of specific advertisements in the information field, using the examples in Annex IV.

Notes on Module 5

1. Vanetti, M., La communication-marketing dans les petites et moyennes entreprises. Geneva, Institut suisse pour la formation des chefs d'entreprises, 1984, p.19.

2. Lovelock, C.H. and Weinberg, C.B., Marketing for non-profit managers, New York, Wiley, 1984, p.378.

3. Darmon, R.Y., Le marketing. Fondements et applications. Montreal, McGraw-Hill, 1982, p.327.

4. Pettigrew, D. and Turgeon, N., Les fondements du marketing moderne, Montreal, McGraw-Hill, 1985, p.227.

5. Chirouze, Y., Le marketing. Le choix des moyens de l'action commerciale, Paris, Chotard, 1986, pp.118-119.

6. Ibid. pp.119-122; Darmon et al., op cit., pp.346-348.

7. Tillman, R. and Kirkpatrick, C.A., Promotion: communication en marketing, Montreal, Presses de l'Université du Québec, 1975, p.189.

8. See in this connection: Tillman, R. and Kirkpatrick, op. cit., pp.193-215; Joannis, H., Le processus de création publicitaire, Paris, Dunod, 1979.

9. Chirouze, op. cit., p.134.

10. Lovelock and Weinberg, op. cit., pp.396-400.

11. Lovelock and Weinberg, op. cit., Chapter 17, pp.494-530; Kotler, P., Marketing for non-profit organizations, Englewood Cliffs, N.J., Prentice-Hall, 1982, Chapter 19, pp.422-447.

12. Levasseur, P., Comprendre le marketing, Montreal, Editions de l'homme, 1986, pp.156.

13. Chirouze, op. cit., pp.143-144.

3.6 MODULE 6: Marketing strategy and planning

GENERAL OBJECTIVE:

To understand the relationship between planning and strategy in marketing.

SPECIFIC OBJECTIVES:

At the end of this module the student should be in a position to:

1. understand how marketing fits into the planning of information services;
2. define market segmentation;
3. define the concept of the target public;
4. identify the components of the marketing plan.

3.6.1 Strategic planning

Marketing is a planning tool and it is therefore important to understand its contribution to this vital management function.

One of the basic principles of marketing is that it is impossible to satisfy everyone with the same product or service. Managers must therefore evaluate a number of products or services and select the mean(s) they consider most appropriate to attain the objectives established on the basis of market needs. That is why marketing people speak of strategy in connection with the decision-making and selection process in which managers must engage to make their organization as effective as possible.

Kotler explains that the term has been borrowed from military vocabulary and provides the following definition of strategy: 'marketing strategy is the selection of a target market(s), the choice of a competitive position, and the development of an effective marketing mix to reach and serve the chosen customers'(1). It is therefore a process which will provide the basis for the planning of the organization's services and products, involving quite specific ingredients which play a key role in marketing: the concept of a target public, the selection of an advantageous position in relation to the competition, or the selection of a 'niche', and a satisfactory definition of the ingredients of the marketing mix.

The first stage of the strategy is market segmentation. That is to say, the division of the market into more homogenous sections within which it is possible to pinpoint target publics. A particular mix is then adopted for each of the targets identified in order to build up the organization's marketing strategy, which will be set out in its marketing plan.

3.6.2 Market segmentation

As we have already said, it is difficult, if not impossible, to satisfy everyone with the same product. In order to overcome this obstacle marketing strategy employs the technique of market segmentation.

This involves dividing the market into sections which are easier to reach because they are more homogeneous. A mix can then be selected which caters more effectively to their needs.

The division or segmentation of the market may be based on various criteria, the commonest of which are undoubtedly sociological, such as age or sex. For example, it is a recognized fact that women do not use public libraries for the same reasons as men. There is also a difference of this kind between older and younger users. Therefore public libraries will often have recourse to sociological segmentation with a view to the strategic exploitation of different products for each of those segments: e.g. action-packed novels for men, and literature with a greater psychological content for women; easy-to-read books for the very young, and a reference collection for adults.

At university level segmentation tends to be based on the educational level of users: lecturers, Ph.D. students, M.A. students and undergraduates. In this case, too, specific library products will be proposed for each segment: access to data bases, research collections, collections of journals, reference works.

Specialist and archive services may segment the market according to the typical behaviour of their customers: daily customers, telephone customers, occasional customers, non-customers, etc. Different services may be offered or drawn to the attention of each of these groups: the selective dissemination of information, access to the documentation centre's automatic catalogue through their own terminals, accession lists, press-cutting service, etc.

National and international organizations such as data-bank on-line hosts may adopt a geographic basis for segmentation. Through the components of the mix, it will then be possible to establish for each region of the country strategies that are more effective because more closely attuned to its specific geographic features.

These examples are very simple but market segmentation may be more sophisticated, incorporating psychological criteria or a combination of criteria.

The segmentation technique will help to identify the needs of different sets of customers more clearly and to reach them more easily by personalizing, as it were, the relationship with the market.

3.6.3 The target public

For reasons of efficiency managers may choose to disregard one or several segments of their market. They will then concentrate their strategy on one or several segments which we shall call target publics.

A target public may be selected because it offers certain advantages to the organization - being easier to reach, for example, as it consists of people who have always used the service concerned (women at home in the case of public libraries, research staff in the case of the documentation centre of a major industry, or top pupils in the case of school libraries).

A target public may also have other advantages for the organization. A case in point would be the heads of large administrations, whose decisions affect large numbers of people, and also leaders of opinion who influence broad sections of the public. Mention may likewise be made of town councillors and other officials in the case of public libraries, vice-chairmen and senior management within business firms, and teachers in educational establishments. Once a small group of influential individuals has been reached it becomes easier to convince other potential customers of the importance of the information service as they tend to model their behaviour on that of their superiors. Such influential people may also be able to defend the service when the time comes.

Priority may therefore be given to one or several target publics for a given period even if attention is turned to the other segments later. Nevertheless, it is no easy matter, in a public service context, to neglect groups of customers that one is supposed to serve under the often very broad terms of reference assigned to information services. But a decision must be taken to limit the number of targets as it is difficult to provide an adequate service for the entire population.

3.6.4 The marketing plan

There are three types of organizations according to certain marketing specialists: 'those which instigate events, those which look at what is happening and those which wonder what has happened'(2). The difference between the first and the other two categories may depend on whether or not the organization concerned has a good marketing plan.

The marketing plan sets out the organization's strategic choices on paper, justifying them and explaining how its marketing goals are to be achieved.

Marketing plans may cover periods of varying length. Organizations are increasingly adopting plans spread over several years in view of the scale and frequency of the changes currently convulsing society, particularly in the area of technology. A marketing plan must cover a minimum period of one financial year.

The role of the plan is, of course, to guide the staff in its approach to the market. It ensures good communications between all those involved by specifying exactly what is to be done in each sector of the organization and, in the process, informs each and everyone of the direction in which the organization is moving.

It also has an important role to play when the time comes to assess whether the organization's marketing objectives have been reached or not. It can then guide managers in the drafting of the next plan. Nothing is more difficult than taking stock of a situation in which the task to be completed was never accurately defined in the first place.

An organization may have several plans, including a plan for its general development which will probably stretch over a longer period than the marketing plan. The difference needs to be underlined for the goals of the marketing plan are concerned with the market or markets to be supplied and the organization's relationship with those markets. The general plan covers all aspects of the organization, including purely internal matters.

An organization may also have several marketing plans depending on its size. A manager may decide to adopt a marketing plan for each major category of product or service supplied. Thus a major archive service may formulate one plan for regularly consulted documents and another for documents which are seldom or never consulted.

The marketing plan should therefore be considered as a genuine work tool. It may sometimes prove extremely useful even before it comes into force, e.g. by providing support for managers' financial submissions to their superiors.

There are several ways of formulating a marketing plan. But, essentially, it involves answering the following questions: 'What stage have we reached? Where do we wish to go? How can we get there?'.

The first part of a marketing plan is always an analysis of the situation, during which the first question must be answered. Managers too often tend to dodge this stage despite the fact that the very roots of marketing, lie in such an analysis: the strategies and all the actions that follow depend on this analysis. It is therefore essential to ensure that the first stage is properly conducted.

The information necessary for the analysis of the situation is provided by marketing research, which attempts to take stock of the market and the environment, registering needs and significant factors, and also to review the situation of the organization, recording its strengths and weaknesses. This research is therefore divided into two parts: the external analysis and the internal analysis.

Figure 3.16: The marketing plan in outline

1. Outline of the plan

2. Analysis of the situation:

   - external analysis (market and environment)
   - internal analysis (organization)

3. Strategic phase:

   - mission
   - goals

4. Formulation of tactics

5. Budget

6. Monitoring procedures

The external analysis involves describing the environment outside the organization and determining the characteristics and needs of the market as reflected in the marketing research findings. The external environment will be described in terms of the factors with a potential role in strategy formulation: the economic, socio-cultural, political, legal, technological and legal situation and the state of the competition.

Analysis of the economic situation will establish the prevailing economic conditions, such as the average income of customers.

Analysis of the socio-cultural situation will provide an evaluation of the tastes, habits and attitudes of the target market - perhaps, even, the current fashion - so as to prepare the ground for effective strategies.

The political situation may also influence strategies: it is necessary to identify trends as well as the opportunities that arise, such as new State subsidy schemes.

On the legal front some laws - for example, laws on consumers' rights - will have an impact on possible strategies. This aspect of the environment must also be borne in mind.

It is particularly important to evaluate the technological environment in the information field: the developments are very numerous and they can play an important part in strategies.

It is generally believed that information services, particularly those in the public sector, do not need to worry about competition. This is a misconception. Although their products are different, bookshops and television, for example, are in competition with libraries as they have the same audience and attract those who might otherwise use libraries. Competition also exists at the generic level - in this case, information and leisure.

The characteristics and needs of the market will be determined on the basis of the secondary data or a collection of primary data, as explained in the module on marketing research.

The internal analysis is an examination and evaluation of the organization's operation. It involves first and foremost a description of the organization. As a marketing plan must be as short as possible, the factors included will essentially be those likely to have an impact on strategy and action. For example, the equipment and premises currently available will be described together with their geographical location, the number and training profile of the staff, the state of the collection, the length of the opening hours and, of course, the budget. The other information to be supplied depends on circumstances: for example, a brief view of the organization's history might even be included if it is believed to be a factor which ought to be taken into account in the definition of strategies.

It is also essential to provide the frankest possible assessment of the organization's performance using the internal operational statistics, which should be kept up to date by the information services: number of loans, number of users, number of requests for information, etc.

This second part of the internal analysis will also draw on the large number of publications concerned with the assessment of information services, such as the Unesco study by Lancaster(3). Such works suggest various indices of performance which could provide particularly useful diagnoses for the internal analysis in the marketing plan.

Once the analysis has been completed we move on to the strategic phase. This involves two operations: a statement of the organization's mission and the selection of its goals.

The organization's mission has been discussed elsewhere in general terms but it must be referred to in the marketing plan as strategies depend on it. An organization's mission is the justification for its existence, its role in society, the purpose for which it was created. The way in which its mission is perceived by managers will necessarily affect the strategies adopted. For example, if the mission of a public library is defined chiefly in terms of books, its strategies will focus on that medium. But public libraries may also define their role more in terms of information in general, as several North American libraries have recently done. These are two different missions for the same organization, which will necessarily be expressed by different strategies. In the first case the emphasis will be placed on such factors as the variety of the book collection or on activities to promote reading. In the second case certain products will be offered, such as a telephone information service, data banks, alternative media (video cassettes, films, records, etc.).

The organization's mission should therefore be restated at this stage, during which it will often be reformulated.

The second task in the strategic phase is to define the strategies as such in terms of the goals to be attained. In order to discover the best strategy or strategies it is usually necessary to look at several. The imagination plays an important part in this process, and it is often useful to involve the staff in group discussions.

The first component in the strategy is usually the choice of target or targets among the segments identified during the external analysis. The next step is to formulate a marketing programme for each target selected, i.e. to identify the various ingredients in the marketing mix that will suit the public in question.

For example, a university library may select the teaching community as a target and base the corresponding marketing programme on the promotion of the product 'data banks'. This choice could be justified by the novelty of the product and the interest it may consequently arouse, combined with the research role of the teachers, who are in theory always on the lookout for new developments in their field. The marketing programme will include such other ingredients as an appropriate distribution strategy possibly providing for a decentralized service in the various university departments, the hiring of additional staff, a pricing policy including cheap rates for the first piece of research undertaken, and a communication strategy based on the distribution of a leaflet.

A public library could for its part decide to focus its strategy on old people if they happened to be numerous in the neighbourhood and could organize promotional activities adapted to their specific needs or build up a collection of works specifically catering to their information needs, e.g. large-format books or musical recordings suited to their taste.

The formulation of strategies may prove to be a more complex matter in an archive service as conservation is sometimes considered to be a more important function than distribution in archives administration. However, like all subsidized organizations archive services must also increase their public visibility if they wish to prosper in the future. They must therefore identify their public clearly at the analysis stage and they will then find it easier to determine their strategies. For example, one useful strategy for an archive service would be to make itself known to possible patrons using public relations and advertising: the latter might donate their personal collections and even make financial contributions towards the purchase of an important collection.

The documentation centre in a large company may decide to select a segment which already makes extensive use of its services, such as research department staff, in order to encourage still greater use. This could be done by setting up a service to disseminate selectively information geared to particular interests.

On-line hosts and information brokers should also develop strategies in the same way, selecting one or several segments likely to yield greater profits, such as the business community. They should then put together a programme for their target public: a product aimed specifically at it; distribution geared to its habits; a staff capable of speaking its language; a price range corresponding to its needs and resources; and an advertising campaign that attains its target.

An organization may, of course, select several targets and several strategies for the same target. Its financial resources will naturally be decisive in the choice of both targets and strategies. If resources are limited it is a good idea to select one target and adopt a modest marketing programme. It should be borne in mind that it is impossible to satisfy everybody in the same way, hence the different programmes for the targets selected.

Once the strategies have been settled it must be decided how put them into practice. That is the beginning of the tactical phase. It is not always easy to distinguish between strategy and tactics. Whereas a strategy is defined in terms of rather general goals (target and marketing programme) tactics explain how these goals are to be reached. Thus, one strategy for a public library might be to provide a better service in a specific district (target) by including the opening of a branch (distribution) in the marketing programme. The tactical component of the strategy would involve decisions on the siting of the branch and the planning of its construction.

In the example given above concerning university teachers and data banks, the communication strategy adopted involved the preparation of an advertising leaflet. But what message should the leaflet carry and what form should it take? These are questions which will be answered at the tactical level. The strategy for the distribution of the selected product was to decentralize the service in order to reach teachers in their departments. But how exactly should this operation be carried out? The strategy also stipulated that additional staff would have to be hired. But what type of staff? Full-time or part-time? With what training? On what salary? Similarly with regard to the pricing strategy comprising reductions for the first retrievals made, tactics would concern the precise way the scheme was to operate.

The marketing plan would not be complete without a budget component. A serious plan must assess the cost of each strategy so that it can be properly evaluated. This exercise is particularly important when the plan is to be submitted for the approval of boards of directors or supervisory authorities. As most information services tend to have slender resources, the financial presentation must be clear and meticulous.

Budgeting should not be too difficult once the strategies have been worked out in detail during the tactical phase. All that needs to be done is to put a figure on the tactical operations listed above. The more clearly co-ordinated the tactics, the easier it will be to calculate all the required sums rapidly and accurately.

Also for the sake of clarity it is advisable to include what is usually referred to as an executive summary on the first page of the plan. This type of summary sketches the broad outlines of the plan and provides an idea of its overall shape from the outset. A table of contents will usually be provided after the summary for the same reason.

Managers must also establish monitoring procedures enabling them to check the smooth operation of the marketing plan both during implementation and on completion.

The strategies adopted may quite conceivably fail to work as planned and it must be possible to identify such situations as quickly as possible. Annual plans could be checked every month to see whether or not the targets are being reached.

To this end, numerical targets will be set in the case of most strategies. These targets may be an integral part of the plan. A check may then be carried out simply by comparing the statistics for the relevant period with the corresponding targets. Tools such as PERT (Programme Evaluation and Review Technique) may be employed to produce diagrams of the projected activities, thus improving control of the marketing plan(4).

The targets of profit-making organizations are frequently formulated in terms of profits and all that need be done is to check whether the profits

for a given period are satisfactory. In the case of non-profit organizations, statistics for attendance and use are among the criteria employed.

In difficult situations some organizations even develop alternative, 'contingency' strategies, which they may put into effect once the plan is under way if they realize that they have made a mistake. Once the plan has been launched a simple adjustment is sufficient in most cases, but the problems encountered will be taken into account when the time comes to formulate strategies for the next year's plan.

Someone should be responsible for ensuring the smooth operation of these monitoring procedures. This is usually a task assumed by the director of the organization, although some organizations appoint a marketing manager to supervise the plan. It should be realized that even an outstanding and well-structured marketing plan will not be effective if left unsupervised.

3.6.5 Suggested reading

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3.6.6 Evaluation exercise

In order to apply the lessons of this module and the entire range of marketing concepts which have been covered, students should be asked to design a small marketing plan of 15-20 pages in length for an information service with which they are already familiar. This may be a centre which they have attended for other courses, where they have been on placement or where they are already employed. The centre concerned must, however, be able to supply students with some information about its customers and its internal operation so that they have a basis on which to develop their strategies They may work in teams of two to three. The work may be spread over several weeks and is intended mainly for full-time students in pre-service training. Part-time students in in-service training may tackle this exercise by dividing the training component into two sessions several weeks apart.

When their plans are ready the teams may present the results of their efforts to their fellow students: this will enable those taking part to discover other approaches and to discuss their content.

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4. CONCLUSION

4.1 Epilogue

There are several ways of bringing a course on marketing to a close. Some authors repeat the points made in the introduction in order to draw attention to the basic principles involved. Others prefer to discuss specific applications of marketing and, in particular, the implications of marketing management in an international business context. It is always possible to wind up the course by looking at the very promising future for the application of marketing to information services.

In our view it is important to end with some observations about the problems of marketing so that students are not left with the idea that things are too easy and that marketing will solve all of the profession's problems.

Just as computers alone cannot solve all of the problems encountered in the management of documentation services, marketing should not be seen as a panacea, a sort of deus ex machina which will remove all the obstacles in the path of information services. Marketing is more than a mere implement but it is still basically a tool of the trade: success depends on its proper use.

Lovelock and Weinberg are right to point out that the application of marketing is no easy matter. Its success depends on a myriad of details and there is no automatic guarantee that an excellent strategy will bear fruit: 'While excellent execution cannot save a misdirected strategy, only good execution can transform a sound strategy from plans on paper to reality'(1).

The main problem appears to be that it is difficult to integrate the marketing approach at all levels in an organization. That is why Lovelock and Weinberg speak of 'the marketing of marketing'. The very idea of marketing is an innovation and it must be 'sold' to all the members of an organization in order to check the resistance to change which naturally affects the adoption of all new ideas.

The first task is to ensure that senior management in the organization endorses and understands the marketing approach. Without the support of their superiors, the managers responsible for marketing planning may find their projects blocked. We have already explained that the marketing approach may lead to major changes within an organization. And if an organization is to go along that path it is better to warn senior management in advance of the possibility and obtain their agreement.

All the managerial staff in the organization must also be convinced. While most managers recognize today that no single management function is more important than the others and that what matters most is the co-ordination of all these functions, power disputes between managers still occur from time to time. In a marketing context, however, the efforts of all sectors in the organization must be directed towards the same goal. Conflicts between the production side and customer services are not uncommon. In the field of information, for example, heads of technical services (cataloguing, indexing) must co-ordinate their efforts with the heads of customer services. It may be a good idea to set up special committees to co-ordinate the marketing drive so as to involve the various managers. But such committees must have the power to act.

Lastly, marketing demands the complete commitment of the staff, particularly front-desk staff. As we have already seen, the staff are one of the five 'P's' in the marketing mix. They can provide a base for the

marketing strategy but they can also sabotage that strategy. An excellent marketing plan, however ingenious, can be demolished in an instant by staff who are unaware of what is at stake and are discourteous to customers, ignorant of procedures, casual in their attitude, etc.

Various methods may be employed by managers who wish to involve their staff in marketing planning so as to ensure that they contribute to the operation. The decentralization of responsibility, particularly in large establishments, makes all units more aware of the importance of their own contribution to the organization's overall ouput for the public. Thus, large public libraries with several branches would be well advised to decentralize marketing planning and control to local level.

Service manuals may also be produced describing how to behave with customers: the importance of smiling and looking at the customer; key expressions for use in approaching customers and answering the telephone; maximum wait time at the loans counter, for bibliographies, for retrievals, etc.

Lastly, training sessions conducted by experts may often help to make staff more aware of the marketing approach. It may not be necessary to present marketing concepts in depth at such sessions except, perhaps, for managers. Even a straightforward lecture on basic principles may sometimes fire the enthusiasm of staff at all levels.

More important than anything else, perhaps, in a course on the marketing of information services is to enable students to acquire a service-oriented attitude, that is to say, the belief that users both real and potential should be their central concern at all times.

In the final analysis, the question is not whether information specialists should or should not become involved in the marketing approach, since they are already involved. As we have explained, the purpose of marketing is to maximize exchanges, and exchanges are part of the daily business of all information services. Moreover, we are living in a society whose institutions are based on the notion of exchange. We are dependent on others to a greater or lesser degree for services and products.

The real question is, therefore, whether information services are content to merely submit to the laws of this society based on exchange or whether they will take the initiative by fully utilizing the tool of the future that marketing represents.

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ANNEXES

ANNEX I: Case study: the University Library of Bellefeuille-sous-Bois

ANNEX II: Objective test

ANNEX III: Example of poor questionnaire - exercise

ANNEX IV: Examples of advertising

ANNEX I

Case study:
The University Library of Bellefeuille-sous-Bois

Bellefeuille-sous-Bois is a pretty little town some 50 km from the sea and about 100 km from the mountains and ski centres. Its [illegible]icus past has made Bellefeuille a regional tourist capital. It has few industries (electronics, wood and furniture), but it is the headquarters of several public and private service organizations (major insurance companies, well-known engineering firms, a government telecommunications centre, etc.).

The town has a population of 75,000 with an average income higher than the national average. In fact, Bellefeuille is basically a middle class town which still has an old aristocracy much appreciated by the population as it provides confirmation of the town's past history. The old part of the town is located on a sort of plateau over 100 metres above sea-level. A working-class district has developed in recent years to the north-east of this plateau near the electronic components factory which is owned by an extremely powerful foreign holding company.

The University of Bellefeuille-sous-Bois is an institution with a very fine reputation. The campus occupies nearly two square kilometres to the north of the town close to the new district. It has 7,000 students and 170 teachers/researchers working in the following departments:

Humanities	Social Sciences	Pure Sciences
Arts	Sociology	Chemistry
History	Law	Biology
Visual Arts	Criminology	Physics
Theology	Social Work	Computer Science
Translation	Information Science	Geology
	Management	Mathematics
		Astronomy
1,650 students	2,860 students	2,490 students

The Departments of Management and Chemistry are particularly dynamic and have recently worked out agreements with the business community. However, the reputation of the university rests largely on the History Department, which appears to be responsible for a large part of the research done on campus (the department has an archaeology section whose recent work on underwater archaeology has won international recognition). The Department of Information Science is also very active internationally and its teachers regularly take part in conferences abroad. Their courses touch on archives administration and documentation as well as library science but few contacts have been made with the University Library Service as the teaching staff have been on poor terms with the Director of Libraries for several years.

The Director in question is on the point of retirement. His entire working life has been devoted to a major project for the construction of a central library which is intended to bring all the library services on campus under one roof. Work started two years ago and the opening ceremony is scheduled for the start of next session. A small budget has been set aside for the celebration of this event. The Director's project has experienced several setbacks. The style of architecture proposed was rather forbidding and the concrete shell gave the building an austere look. No provision has yet been made for the decoration and fittings although the opening is only several months away. Moreover, the library had to be built at the northern end of the campus beside the building reserved for law studies. There is no Underground in Bellefeuille but the campus is well served by the local bus network.

The Director's plan was to allocate one storey in the library to each major subject area and the basement to the technical services (see plan attached). The staff have already been assigned to these major sectors. There is one librarian in charge of the service in each sector who is assisted by another librarian responsible for the selection of documents and reception of the public. The team under the head of service in each sector also includes three assistant librarians and six other staff for loans and shelving work. The library is an open-access one. Its Director also has a deputy responsible for the co-ordination of customer services.

As the university authorities have been obliged to reduce their expenditure, the library's total budget has dwindled by 2 per cent every year for the last five years. The Director strongly defended his acquisitions budget, which continued to grow in spite of everything; but 2.5 posts have had to be cut over the past three years, including one in the Social Sciences Sector. The number of acquisitions has thus been stabilized since the imposition of budget limits.

Delays in the cataloguing service, on the other hand, are increasing all the time (one post has also been cut there). Two years ago the Director signed an agreement with a cataloguing network enabling him to locate catalogue entries in a data bank and thus speed up the work. But there appears to be a problem: the new procedures are less efficient, perhaps because the staff have not really become used to them or because the system does not function properly.

The library's general performance is not very good: the number of loans fell by 12 per cent last year. A rapid survey of the teaching staff was carried out but this produced little information: the response rate was very low and the questionnaire only contained five (open-ended) questions.

The services provided are quite limited. The opening hours are from 8.30 a.m. to 7 p.m., except on Saturdays when the library closes at 5 p.m. It is also closed on Sundays. Users have asked for it to be opened in the evenings and on Sunday afternoons, but the management has no attendance statistics which would justify this step, although the staff have noticed that the number of customers increases at the end of the afternoon.

It is believed that students who wish to work during the evening use the town library which has recently opened a branch in the area near the campus: this is a modern, well-equipped and well-lit building with a large collection of reference books and journals (especially, historical). The branch is open on Monday, Wednesday and Friday evenings until 10 p.m. and also on Saturday mornings. The town library will soon be making its catalogue available in machine-readable form, thereby improving its accessibility.

The University Library has two terminals for the interrogation of data banks, which are located in the librarian's office. One of these terminals has been allocated for the exclusive use of the Pure Sciences Sector. According to staff there does not appear to be a heavy demand for this service. Research for the Pure Sciences Sector is carried out by a librarian. Research for the other two sectors is carried out by heads of service on receipt of a request.

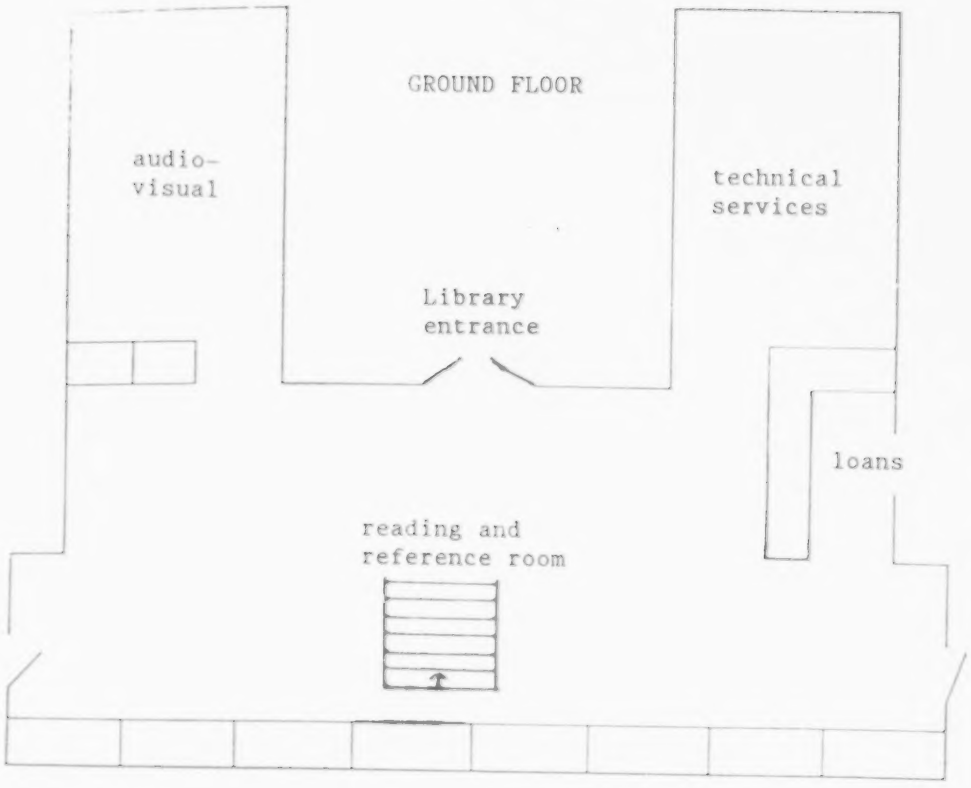
A collection of microform documents (theses and foreign periodicals) is available and there are also some audio-visual documents purchased several years ago by the Biology Department. The History Department has recently expressed a wish to organize its own collection.

In the last few years some departments have also announced their intention of organizing their own documentation centre: one of these is the Astronomy Department, which, in addition to its own collection of monographs, wishes to acquire a new collection of photographs and charts of the sky and outer space. The Translation and Law Departments claim that they too have a right to their own collections as their students make 'laboratory' use of some types of documents (dictionaries in the case of the former and summaries of leading cases and decisions in the case of the latter).

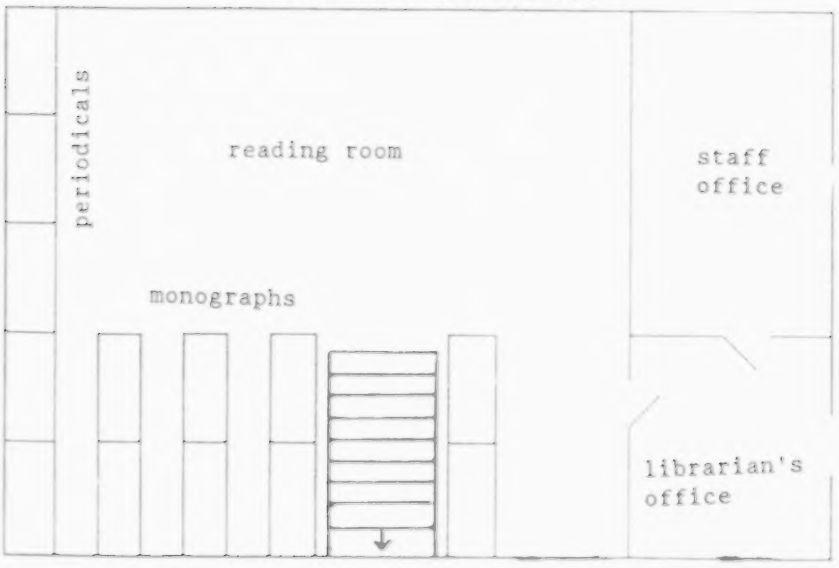
The Department of Information Science obtained resources from the university five years ago for the establishment of its own documentation centre. Those resources were taken from the library's general operating budget.

You are a candidate for the post of Library Director as the old Director is about to retire. You have been invited to a selection interview together with the other candidates on the shortlist. The Vice-Rector of the University is the chairman of the selection board. He asks you to identify the library's major problems in terms of marketing and to suggest the strategies and tactics which seem to you to be most appropriate. What is your response?

Plan of new building



STANDARD FLOOR LAY-OUT



ANNEX II

Objective test

True or False

T/F 1. Marketing in an organization is solely connected with sales operations.

T/F 2. The first stage in marketing is to adapt products and services to customer needs.

T/F 3. Marketing may be regarded as a philosophy of management.

T/F 4. The idea of marketing is a product of the modern management techniques developed over the last two decades.

T/F 5. The five variables in the marketing mix are the product, distribution, communication, staff and production.

T/F 6. In marketing strategy, the various ingredients in the marketing mix may be selected independently of one another.

T/F 7. It is dangerous to define the market in terms of the product being produced.

T/F 8. Segmenting a market means dividing a large mixed market into several relatively homogeneous segments.

T/F 9. Each market segment has its own marketing mix programme.

T/F 10. The information field benefits from a situation in which there is no competition.

T/F 11. The activities of competitors influence the product's life cycle.

T/F 12. The organization's task is to formulate a programme of activities necessary to achieve its goals.

T/F 13. The establishment of marketing strategies is the last stage in the process of marketing planning.

T/F 14. Once formulated the marketing plan should remain unaltered for the entire period in question in order to avoid subjective decisions.

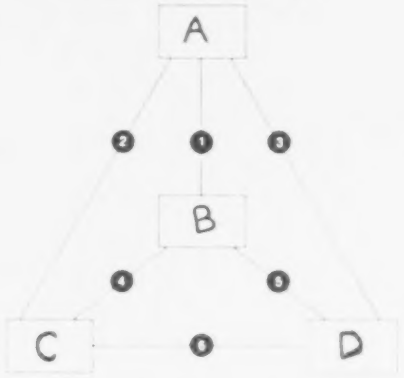
In the following diagram representing the transfer of information as conceived by Brenda Dervin, identify the four main components:

15. A) .....

16. B) .....

17. C) .....

18. D) .....



Multiple choices

19. Which of the following factors does not form part of the marketing environment:

(a) the legal context
(b) technology
(c) the customers
(d) the competition
(e) the socio-cultural context

20. Which of the following factors is an uncontrollable variable in marketing:

(a) the product
(b) the competition
(c) the location
(d) the promotion
(e) none of these answers

21. The market should preferably be defined in terms of:

(a) the product being supplied
(b) unsatisfied needs
(c) the resources of the organization
(d) the legal constraints imposed by the environment
(e) the pricing policies of competitors

22. The first stage in the marketing planning process involves:

(a) the development of possible activities
(b) the drawing up of a schedule
(c) an analysis of the situation
(d) the formulation of strategies
(e) the fixing of a budget

23. Which of the following alternatives cannot provide a basis for market segmentation:

(a) the geographical location
(b) the size of the population
(c) the level of use of the service
(d) psychological characteristics
(e) none of these: all of the above factors may provide a basis for segmentation

24. Which of the following statements does not reflect the information-seeking behaviour of scientists:

(a) information must reach them rapidly
(b) periodicals and research reports are practically the only data media they use
(c) they never communicate orally with their colleagues
(d) they tend to delegate their bibliographical and browsing activities
(e) all of these statements reflect the information-seeking behaviour of scientists.

ANNEX III

Example of poor questionnaire - exercise

1. Name:

> The beginning of the questionnaire is too abrupt. It could have a title and a brief introduction. Is the name of the respondent really necessary?

2. Sex:

3. Age: 20 to 25
   25 to 30
   30 to 35
   over

> The age groups overlap. What if the respondent is under 20 years old? The final category is unclear.

4. Do you visit the university library regularly every week during term time?

   1. I practically never visit the University library.
   2. I visit the library at regular intervals.
   3. I visit the library regularly every week.

> This question is ambiguous to say the least: it is possible to visit regularly on a monthly basis. The possible answers proposed are also ambiguous and are not exhaustive.

5. Do you visit any libraries other than that of the University?

1. Never

2. Yes, occasionally

3. Yes, regularly.
If so, which type?

> The attendance categories suggested may mean different things to different respondents. It would be better to specify frequency of attendance: once or twice a week, two to three times per term, etc.

6. Do you find the reception at the library:

1. Very efficient
2. Efficient
3. Inefficient

> Efficiency may not be defined in the same way by all the respondents: the question could be more specific. Scales of this type should be as symmetrical as possible. Hence one category is missing: wholly inefficent.

7. Are you aware that data banks are available?

1. Yes
2. No

> This question suggests an answer. The question could be more subtle and so could the suggested answers.

8. Do you think that information training would improve your learning capability and enable you to obtain better academic results?

This question has too many implications and employs concepts which will be difficult for respondents to handle. Furthermore open-ended questions of this sort produce highly disparate answers which are difficult to analyse.

Examples of advertising

2>

1

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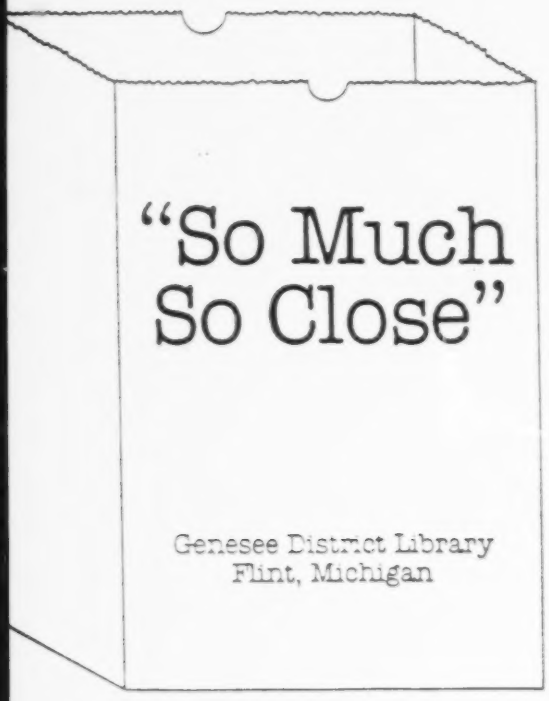
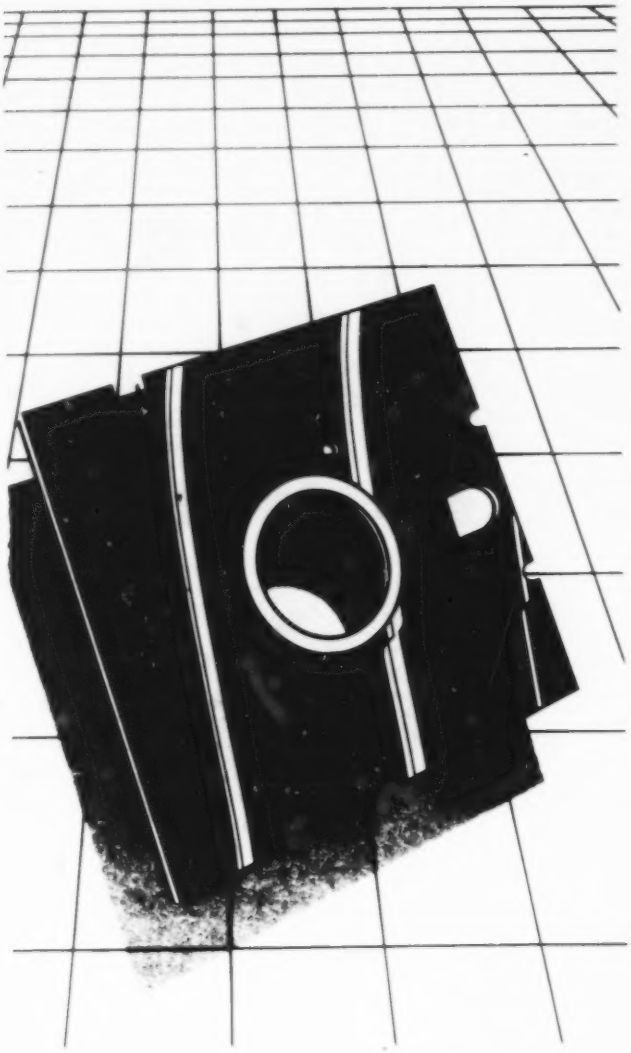
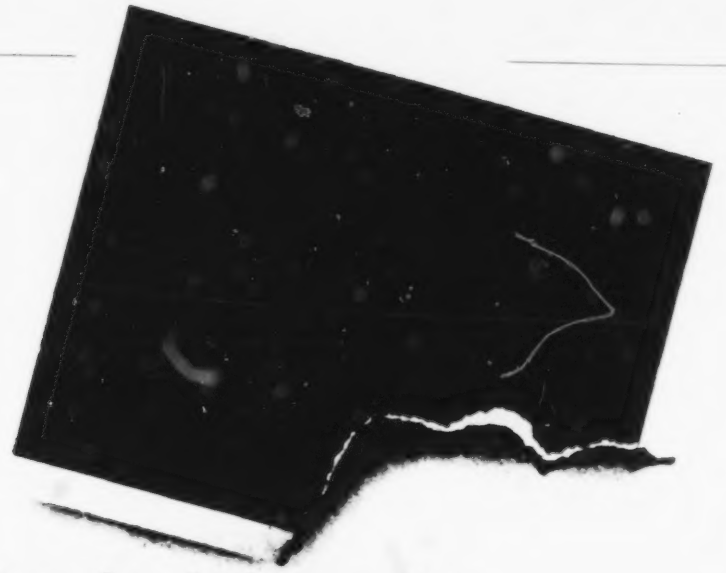




If You Think SAZTEC is just Data Entry...



You don't have the Whole Picture

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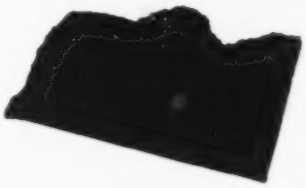

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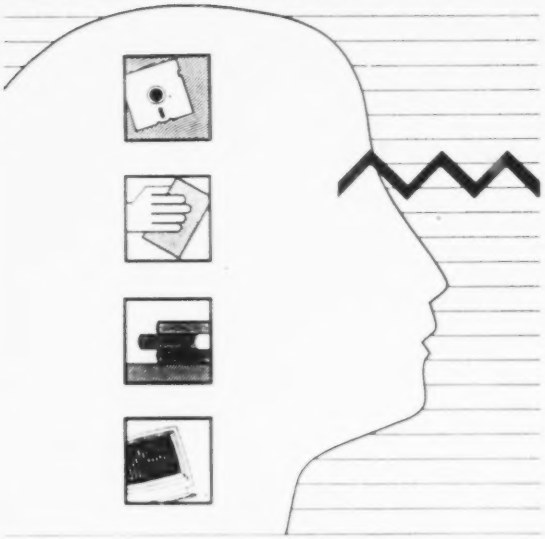
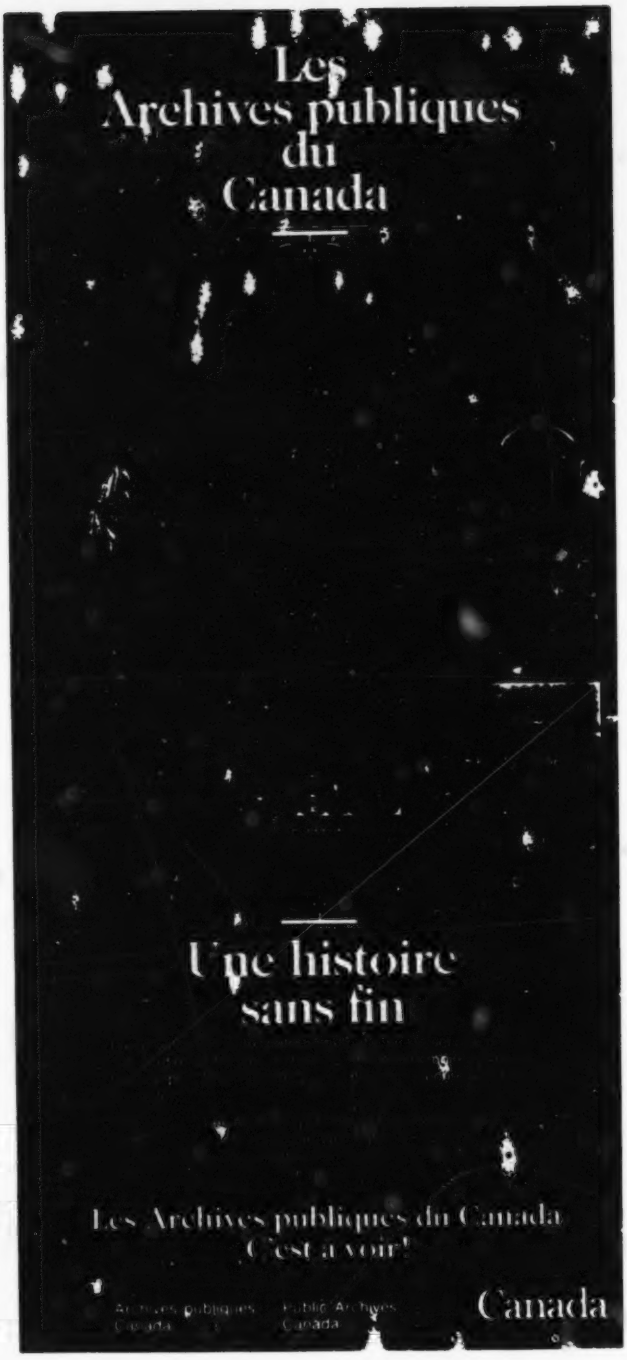


Le Service d'information documentaire de l'École Polytechnique de Montréal



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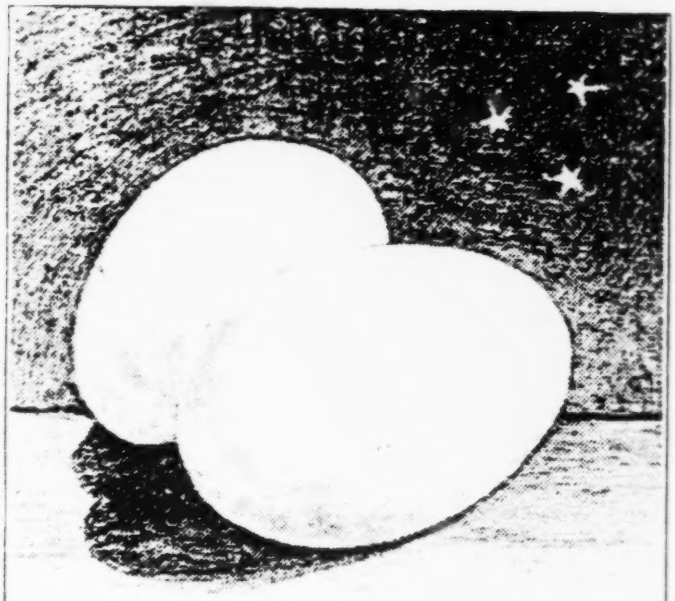

Pregnancy

The Nioga Library System's Health Library Project (HELP) is designed to bring you, the consumer, health information by way of the public libraries in Niagara, Orleans and Genesee Counties. Health information is available on a variety of topics including pregnancy/childbirth. The following titles and other information on this topic can be found at the libraries listed on the reverse side.

Methods Of Childbirth
Bean, Constance — Doubleday, 1982

Surviving Pregnancy Loss
Friedman, Rochelle — Little, 1982

Fertility And Conception: An Essential Guide For Childless Couples
Stangel, John — NAL, 1980

Practical Pregnancy: All That's Different In Life Because You're Pregnant
Wolfe, Maxine — Warner, 1980

7

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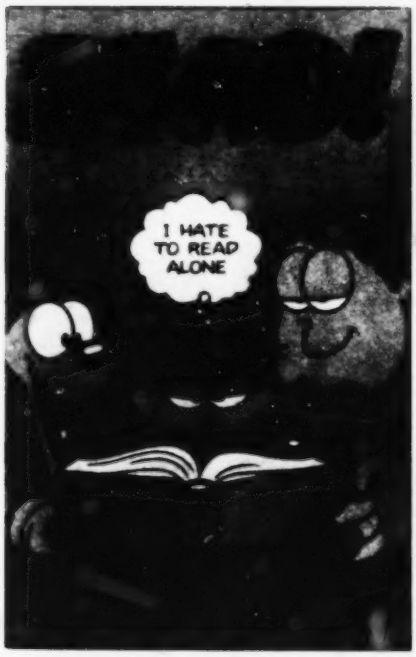
A>


I HATE TO READ ALONE

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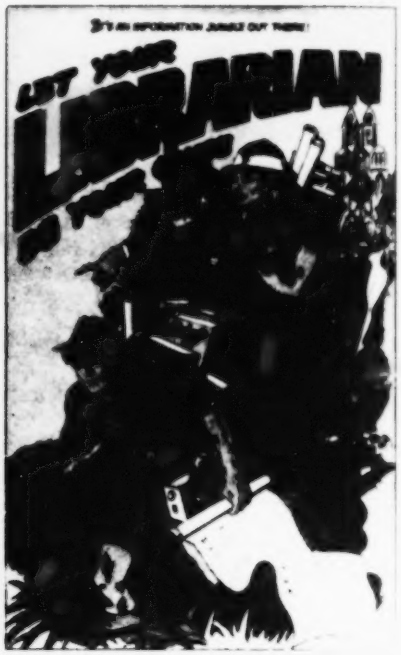
LET YOUR

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ME ENCANTAN LOS FINALES FELICES

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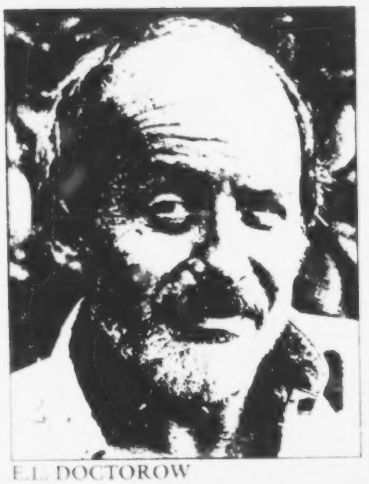
TOM WOLFE



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par sujet,
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par auteur
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ÇA SE CONSULTE...

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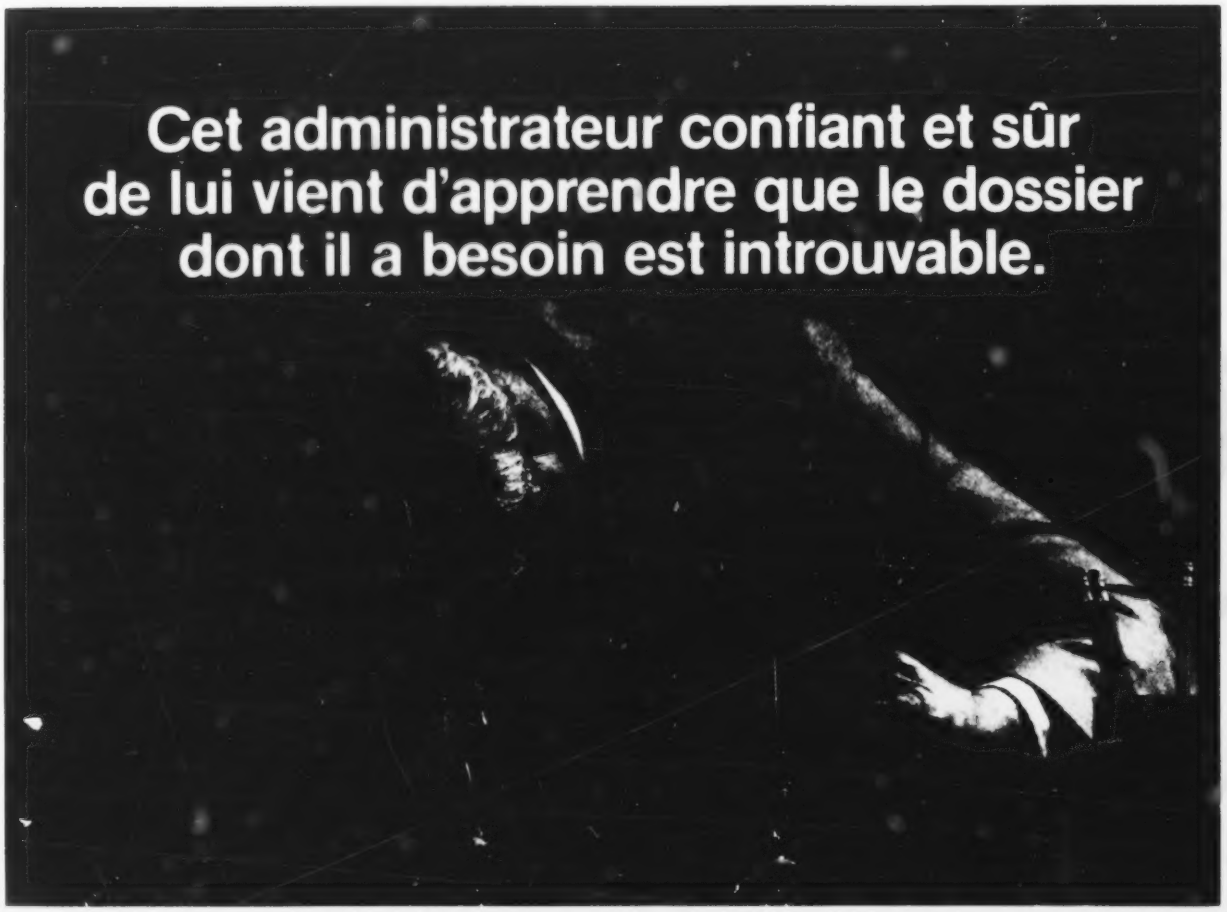

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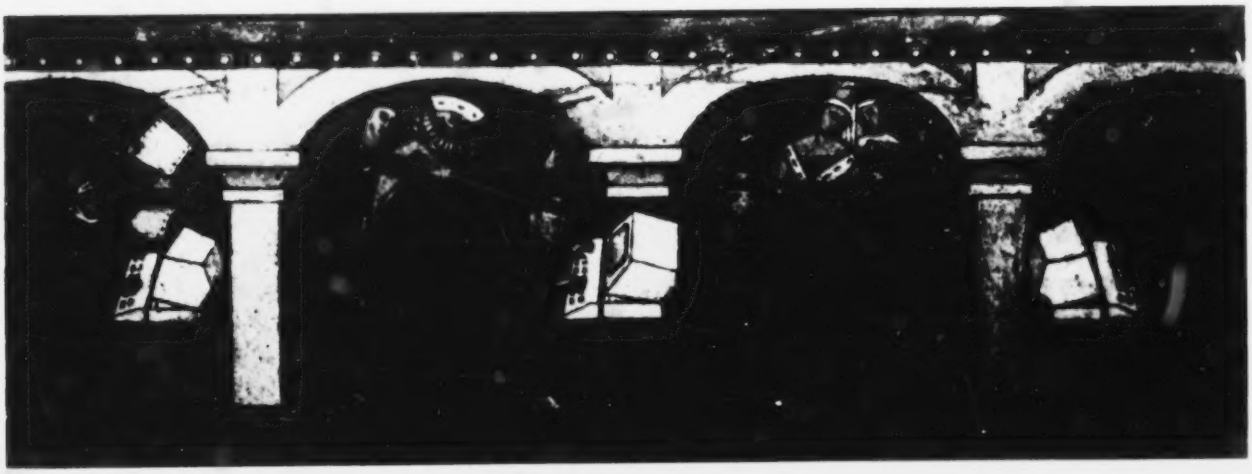

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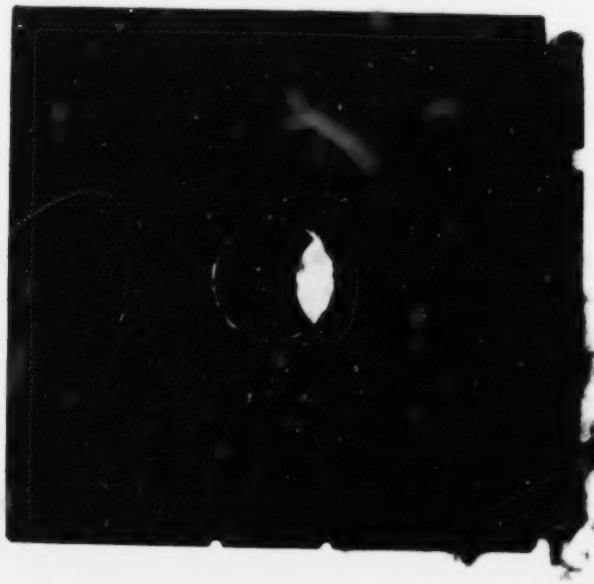

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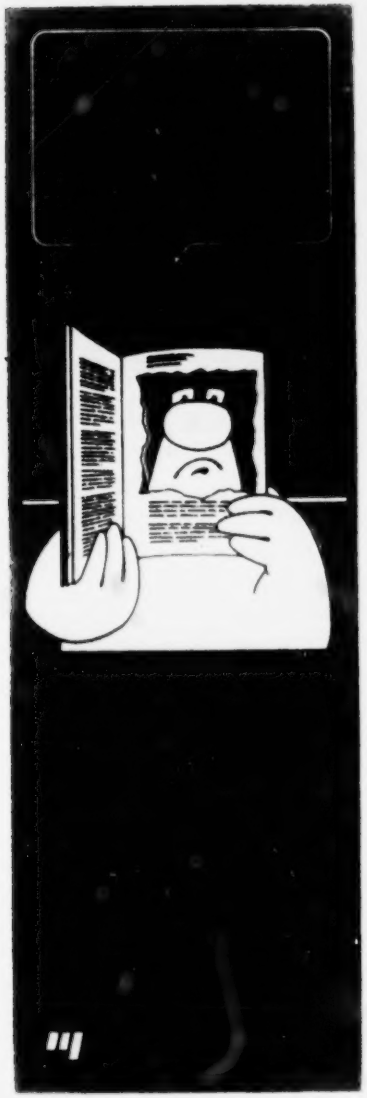

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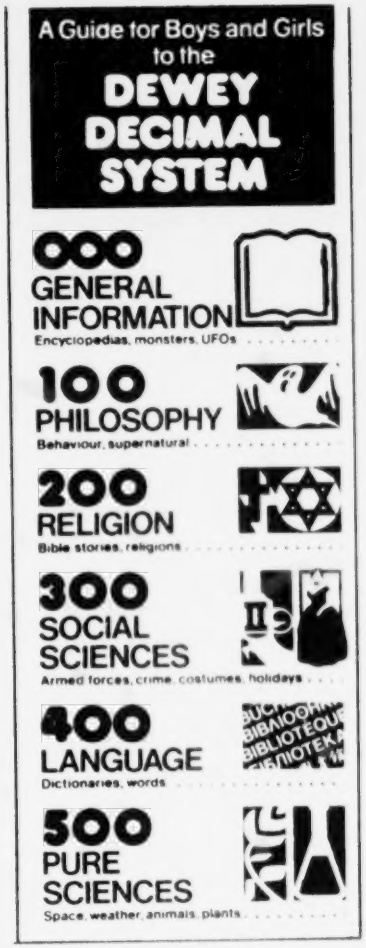
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Copies of the above studies and documents are available from:

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